

AFTER THE RUPTURE: MIDDLE POWERS AND THE CONSTRUCTION OF NEW ORDER

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SUMMARY

- The post-cold war international order is fading, and no clear successor has emerged.
- The US is retreating as the main guarantor of that order and is increasingly acting unilaterally, while China and Russia offer tentative models of order that appeal to the global south.
- In this disordered interregnum, rising and middle powers are expanding their freedom of action and influence through new conflict-mediation styles, reconfigured connectivity networks and new approaches to development governance.
- At the same time, sovereigntist and illiberal movements are strengthening transnational ties and seeking to redefine the political West.
- It is unclear whether any of these initiatives will coalesce into a new global order; currently, they are mostly fragmented and opportunistic.
- Europe should seize these emerging formats as opportunities to shape outcomes, partnering pragmatically rather than clinging to a dying order.

After hegemony

The international system is no longer held together by a single dominant vision of order. The norms, institutions and power structures that shaped global governance after the second world war, later broadened and deepened in the post-cold war moment, are eroding without a clear successor. The US is retreating from its role as architect and guarantor of that order—imperfectly exercised in any case—while simultaneously asserting its dominance through unilateral action and displays of force in Greenland, Iran and Venezuela. At the same time, China and Russia are advancing competing models of order.

In this context, rising and middle powers are actively pursuing new strategies to secure their autonomy and expand their influence. They are challenging established hierarchies, reshaping economic and connectivity networks and building alternative forms of cooperation that do not rely on Western leadership and involvement; some formats are in fact specifically built to circumvent or exclude Western structures and stakeholders. From infrastructure corridors to conflict management and development finance, these players and their actions are generating new sources of order in an increasingly entropic system.

Europe faces both risks and opportunities in this changing landscape. The liberal, rules-based international order has served Europe well, but clinging to its assumptions and practices risks marginalisation. Understanding the shifting balance of power, by contrast, allows Europeans to act as partners in emerging formats of cooperation—not as custodians of a fading system, but as actors capable of shaping outcomes and contributing to effective governance. This does not mean acquiescing to visions of order by the Chinese Communist Party or the Make America Great Again (MAGA) cult. On the contrary, Europeans should contest them systematically and systemically. But it does require Europeans to study and engage with the strategies of rising and middle powers as they hedge and advance selective and sectoral transformations of the global order.

This paper examines these transformations. It explores how rising and middle powers are responding to the decline of the old order and evaluates the potential of new initiatives to create legitimate and effective forms of cooperation. We argue that, absent a plausible and attractive new project for global order, Europe should treat emerging initiatives in areas such as connectivity, development and peacebuilding as constructive and as opportunities to advance shared goals. European policymakers should seek to support and participate in the informal and adaptive coalitions that drive global cooperation, using shared goals with rising and middle powers to shape these initiatives so they align with European interests and values.

Anatomy of the void

In America's 2025 National Security Strategy, the phrase “rules-based international order” appears only once—preceded by a qualifying “so-called” and used to criticise the China policies of earlier US administrations. By contrast, the word “border” is mentioned eight times. This imbalance in language reflects not only the priorities of the strategy itself, but also broader shifts in global politics. Trump's 2017 National Security Strategy shared a similar emphasis on “borders” over “order”(recall the border wall). But then President Donald Trump was seen as an exception in a long line past and future US presidents committed to international leadership. No longer.

The international order that has existed since the fall of the Iron Curtain is rapidly crumbling. Many states no longer feel bound by its norms, while its legacy institutions—such as the UN or the World Trade Organisation (WTO)—fail to respond effectively to real-world challenges and are often sabotaged by their most powerful members. At the same time, energy sources, critical raw materials and cutting-edge technology are increasingly used as instruments of geopolitical influence. The result is a retreat of multilateralism as a guiding principle of international cooperation and a global system increasingly defined by geopolitical competition.

We are living through a geopolitical interregnum in which the old rules formally remain in place but no longer shape global affairs, while a new order—or new orders—has yet to emerge. The present is thus defined more by disorder than by order. One feature of this unsettled moment is already clear: the US continues to see itself as a great power, but no longer as the primary architect or guarantor of global order. In its new security strategy, the Trump administration states that “the days of the United States propping up the entire world order like Atlas are over”. It views the rules and norms it once helped build not as a foundation of global stability but as constraints that no longer serve American interests. The administration's decision to withdraw from “wasteful, ineffective or harmful international organizations” in January 2026 marked a farewell to what it sees as the “sprawling architecture of global governance”. By discarding the post-cold-war and even post-second-world-war liberal consensus, the 2025 NSS signals a fundamental reorientation: US foreign policy is no longer conceived as a vehicle for sustaining international order, but as a tool for advancing narrowly defined domestic restoration.

Trump's threats to annex Greenland, “take back” the Panama Canal and incorporate Canada as the 51st US state, together with a pivot towards the “western hemisphere”, reveal a foreign policy shaped by the logic of geopolitical spheres of influence. At its core, this approach seeks to restore US pre-eminence in its immediate neighbourhood and reclaim the Americas as Washington's backyard. This logic was made unmistakably clear by the US military intervention

and the abduction of Venezuelan leader Nicolás Maduro in early January 2026.

In this respect, the Trump administration's perspective shows areas of convergence with that of Russia's Vladimir Putin and China's Xi Jinping. All three view themselves as powerful actors who stand above—or can bend—the existing rules to suit their narrow interests. In this understanding, international politics is governed by a concert of major powers, while smaller states are left with a more limited degree of autonomy. This does not mean that the major powers are carving up the world in a cooperative or orderly fashion. Instead, their competing quests for resources and influence in Europe, Africa and Latin America are intensifying rivalry, but without an ideological binary—such as between democracy and autocracy, in the view of former American president Joe Biden—that structured earlier phases of international politics.

Russia and China both promote visions of world order detached from traditional Western norms and institutions, yet pursue markedly different strategies to advance them. China works within existing rules, adapting and reinterpreting them to its advantage and seeking to reshape and influence the international order from within—an order from which Beijing has benefited substantially. Russia, by contrast, seeks to weaken the system itself, viewing a more fragmented global environment as one that affords Moscow greater room for manoeuvre.

Together, they instrumentalise the concept of “multipolarity” to appeal to the global south—presenting it as an invitation to loosen ties with a Western-dominated order and to engage with alternative centres of power in a “à la carte” fashion. For many countries in Africa, Latin America, the Middle East and Asia, this message resonates. They often perceive the existing “rules-based international order” as Western-centric, uneven in its application and insufficiently representative. To them, it is no longer fit for purpose. Against this backdrop, China's and Russia's efforts to develop platforms such as the BRICS group or the Shanghai Cooperation Organisation into geopolitical counterweights to the West have gained traction. These efforts then interact with Trump's policies in the Western Hemisphere and collectively create openings for alternative power configurations.

In this moment of international disorder, when rules are rewritten, alliances become fluid and cooperation transactional, rising middle powers are refusing to be reduced to bystanders in great-power competition. Instead, they seek to position themselves proactively by developing influence strategies and coping mechanisms to balance competing dependencies and preserve strategic autonomy. Many explicitly pursue policies of non-alignment or multi-alignment, engaging pragmatically across different power centres and deliberately diversifying their external relationships.

For a growing number of these states, disorder is not viewed primarily as a threat but as strategic opportunity. As power diffuses and hierarchies loosen, countries such as Angola, Brazil, India, Indonesia, Turkey, Saudi Arabia and the United Arab Emirates find room to

expand their leverage, hedge between rival actors and advance their own priorities on more flexible terms. Many of these states are also turning strategic assets—from critical minerals and richly endowed sovereign wealth funds to advantageous geography—into bargaining chips. In this sense, intensifying geopolitical competition is increasingly seen not only as a constraint, but also as a condition that can be navigated—or exploited—to enhance national autonomy and influence.

Meanwhile, cohesion within the once clearly defined Western alliance is weakening. On the one hand, a new transatlantic alliance is taking shape—based on the values and interests of the radical right on both sides of the Atlantic—and on the other, organisations such as NATO are losing political relevance. Summit statements from NATO or the G7 are no longer criticised for overreach but for what they omit, usually out of fear of rupturing consensus or provoking American abandonment.

Europeans are searching for new strategies and partners as well, yet they face particular challenges in adapting to the emerging landscape. Europe's economic strength, security guarantees and global influence remain closely tied to the old order, of which it has been a major beneficiary. More than that, Europeans must be concerned about turning into pawns in the power politics of actors such as Russia, China and even the US under Trump. If Europeans want to avoid that fate, they need to do more than just defend a world that is already fading. They will need to increasingly engage with new forms of order and cooperation—or at the very least, understand where power and influence are flowing.

Strategies by middle powers in a disordered world

As they adapt to international disorder, rising and middle powers pursue a wide range of different strategies. Their unique advantages—resource endowments, geography, extensive diplomatic and economic networks—produce diverse modalities of cooperation. This paper charts five of the most consequential modalities, drawing on interviews with policymakers and thought leaders from around the world.

First are bids to comprehensively supplant the hitherto hegemonic order. These represent maybe the most ambitious but also the hardest response to disorder. Historically, such re-orderings have followed major wars. However, with America stepping back from its central ordering role, rivals, principally China, may see an opening to give it a try without triggering a cataclysm first.

Second are efforts to reconfigure global and regional connectivity networks—the physical and digital infrastructures that facilitate the movement of people, goods, money and data. Rising and middle powers are investing in corridors, ports and platforms to improve their positions,

extract greater benefits from international cooperation and limit their exposure to competitors.

Third are the ideologically driven strategies. A sovereigntist backlash against what many governments have come to see as an overly interventionist order has been supercharged by Trump and his MAGA movement's goal to "purify the West" and reverse perceived liberal excesses. Some rising and middle powers see this as an opportunity not merely to bandwagon with Washington but to forge new formats of cooperation.

Fourth are initiatives to reclaim global public-goods governance. Dissatisfaction with existing institutions' (and their principally Western backers) failure to deliver global public goods, such as health, climate and development, is pushing some rising and middle powers to act. However, rather than simply reiterating first principles of global justice, they are innovating by asserting greater control over their own development paths, with a focus on attracting investment and a more contractual relationship with international partners.

Finally, we look at conflict resolution as a medium for rising and middle powers to advance their standing and influence. International disorder breeds wars. Peace researchers count record numbers of state-based conflicts in recent years after a relatively calm period in the early 2000s. The complexity of today's wars and the background of great-power competition have opened the way for some states to step forward as mediators. Their approach is more personalistic and informal than traditional Western-led processes, but may offer better prospects in halting violence than more conventional and comprehensive peace-making.

The following chapters survey these modalities and their key actors in greater detail.

Replacing the hegemonic order

With great power comes great incentives to secure both command and consent. Hegemony works not just through raw force—which can invite countervailing efforts by the target—but through norms and institutions to win the acquiescence of at least a critical mass of states. While the hegemonic order thus centres around one hegemonic power, that order is more than the whims and whines of its most powerful stakeholder.

The US was the main architect and guarantor of the post-second-world-war order, and the main driver behind the further deepening and broadening of that order after the cold war. In doing so, the US did not act alone or without resistance. At times, it accepted constraints, encouraged reciprocal self-restraint, and used institutions and norms to check others' behaviour.

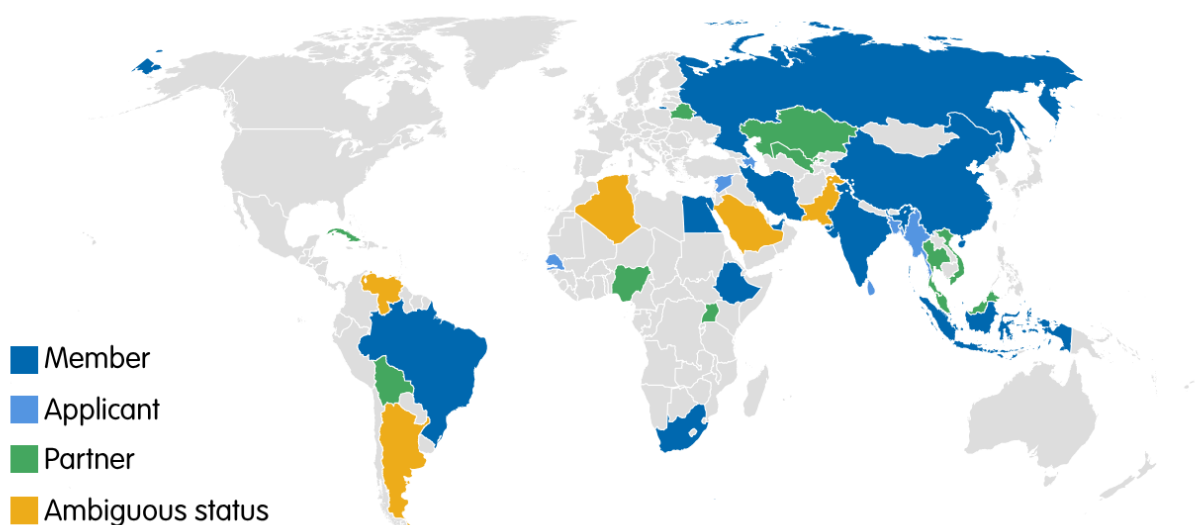
Washington has now abdicated its traditional role. More so, the Trump administration has decided to wield a sledgehammer and break that order in revolutionary fervour. This presents a rare opportunity for rising powers to pursue counter-hegemonic strategies to supplant the

existing order and correct its perceived flaws: under-representation, unequal distribution of benefits from institutional cooperation and the very values that underpin it.

While China's party and state leader Xi Jinping does not tire of repeating that his country “will never seek hegemony”, the building blocks of his foreign policy aim at supplanting the hegemonic order to secure continued party rule at home and expand influence and control abroad. Xi's concept of “community of shared future” sets out a Westphalian vision of global order, rejecting liberal intrusion through “universal values” and instead advancing sovereignty and non-interference as core principles. Yet Beijing's practices has not been fully consistent with this—as its rhetorical and material support for Russia's invasion of Ukraine shows, great powers' “legitimate security concerns” may supersede these principles. With China's power rising, the US retreating, and the institutions and liberal values of the old hegemonic order discredited, China should “become a leading state in comprehensive national strength and international influence” and consequently “actively participate in leading reform of the global governance system”, as Xi himself said.

The end state of Chinese leaders' vision of global order remains somewhat ambiguous, maybe deliberately so in order to have greater flexibility in matching means with ends, and to dilute opposition. However, since 2021 China has advanced initiatives that decidedly promote counter-hegemonic narratives in four areas: development, security, civilisational relations and governance. China-centric institution-building and bi-multilateral (or “n+1”) engagement with existing organisations of which China is not a member but seeks privileged partnership—while excluding the US—are major lines of effort to advance its ambitions.

BRICS+ countries

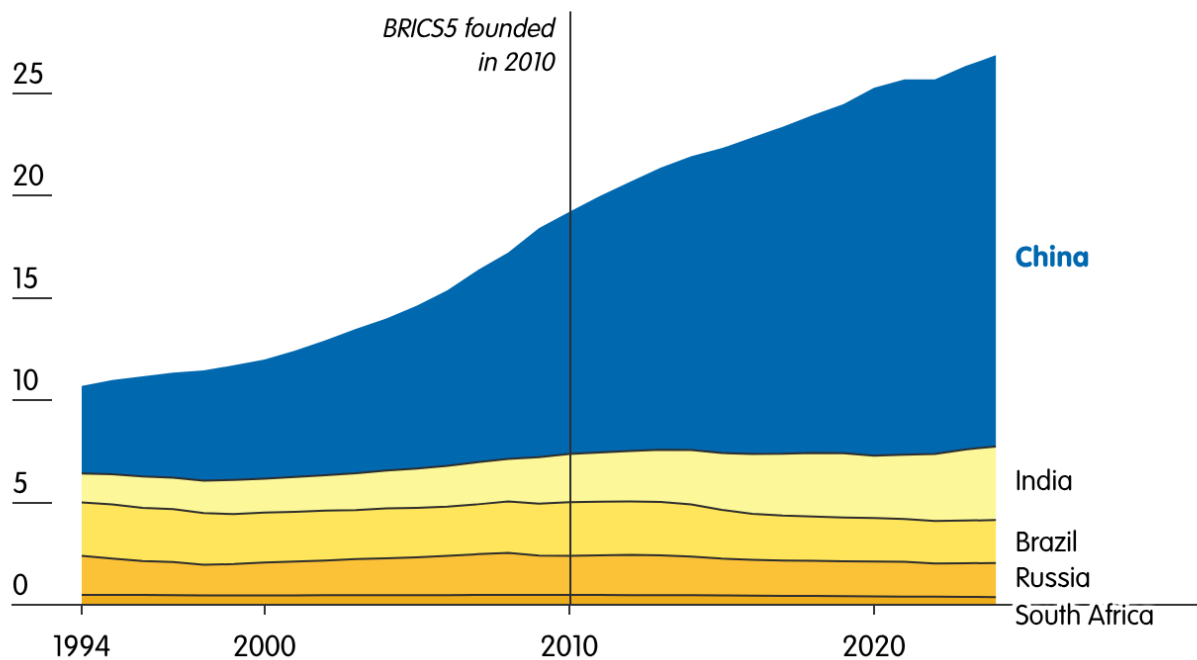


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Two formats stand out: BRICS and the Shanghai Cooperation Organisation (SCO). Usually preferring sub-regional setups, such as the China-Arab states summits, BRICS has been the rare transregional format of importance to Beijing, bringing together leaders of Brazil, Russia, India, China and South Africa since 2010 (with more recent additions of other full members and partner countries in the form of BRICS+). Over time, and despite competing views among its members about how the format can serve their national priorities, BRICS has moved from a largely economic focus to acquire a more geopolitical character. A mere three days after the US intervention in Venezuela in January 2026, BRICS+ countries launched joint naval drills off the coast of South Africa: China, Iran, Russia, South Africa and the UAE sent ships, while Brazil, Egypt, Ethiopia and Indonesia joined as observers—all under Chinese leadership. Activities such as these are in line with China's growing weight in BRICS. Through the format, China boosts its standing by providing alternatives to the American way of order, even if it is not yet fully replacing that order.

Notably, the 2025 BRICS summit in Brazil was the first such meeting that Xi skipped since taking power in 2013. Whether Xi will attend the 2026 gathering in India will signal whether the reason was the low expectations towards last year's gathering in Rio de Janeiro in particular or a general downgrading of the BRICS format amid growing differences among its members. Currently, there are those who seek to hedge against certain aspects of the hegemonic order—such as Indonesia with its “independent and active”, non-aligned, multi-directional-engagement policy—and those who seek to supplant it—such as Iran, Russia and China itself, even if they do not necessarily agree on what to replace it with. Efforts to de-dollarise intra-BRICS financial transactions find support among both groups, but whereas the former view it as a necessary and desirable adaptation within the existing order, the latter consider it to be one step towards a comprehensive re-ordering.

BRICS5 share of global GDP. 1994-2024, in %



Share of global GDP based on constant 2015 US\$

Source: World Development Indicators (accessed December 13th 2025)

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The SCO, in turn, presents an ideal platform for China to advance its vision of security order and to showcase its growing military muscle. Over the past 25 years, China has steered the organisation beyond its original Central Asian, border security and confidence-building focus, transforming it into an instrument of advancing multipolarity. However, like BRICS+, SCO members lack a common vision of a world order involving multiple power centres.

The 2025 SCO meeting in Tianjin near Beijing was followed by a massive military parade, attended by many SCO heads, including Russia's Vladimir Putin and the leader of North Korea (not a part of SCO) Kim Jong Un, to commemorate the 80th anniversary of what it calls the "victory in the Chinese people's war of resistance against Japanese aggression and the world anti-fascist war". The ceremony rhetorically linked the historical experiences of communist China, Soviet Russia and North Korea to contemporary narratives of these countries' struggles against America's hegemony and its alliances in Europe and East Asia. For the 80th anniversary of the Chinese communists' victory over the nationalist government in 2029, Beijing is likely to mount even grander efforts to promote and internationalise the party-state's view of proper global order backed by military power.

Given China's growing power, Chinese-led efforts to create new formats and attract followers are producing gains for Beijing. But success is by no means guaranteed: Chinese efforts to exert leadership, build institutions and diffuse its values are being contested, including from some of the middle-power partners with which China associates itself. Brazil and India, for example, initially resisted China's charge to expand BRICS, fearing a dilution of their influence and of the format's purpose. Their eventual acquiescence nonetheless demonstrated and cemented China's influence.

The existing hegemonic order helped Europe integrate and reshape its relationships with former colonies in an increasingly pluralistic and decentralised whole, even if Europeans at times used violence to preserve their empires. The order suited the EU's and European countries' internal political, economic and social settlements and, to some extent, supported liberal values within the international system. However, Europeans must accept that rising and middle powers have legitimate grievances about how the order entrenched Western dominance and therefore seek to hedge against American constraints on their freedom of action. Many countries have joined BRICS+ primarily to preserve their autonomy rather than to oppose the West. Europe should engage with these countries in ways that serve European interests and values while drawing rising and middle powers away from China and Russia. If "personnel is policy", then supporting more non-Western leadership and appointments in forums and organisations would signal European respect for rising and middle powers' growing stake in international governance. At the same time, Europe should oppose attempts by China and Russia to exert anti-Western control over multilateral institutions. This would help systemically and systematically contest these countries' counter-hegemonic projects.

Reconfiguring connectivity networks

Half a century ago, countries that had little influence on international trade and financial and information flows have become major shapers of global connectivity infrastructure projects. This trend has coincided with the deepening deadlock of the WTO, pushing rising and middle powers to pursue other strategies to claim trade benefits. China and its Belt and Road Initiative (BRI), launched in 2013, might be the most prominent example. In the 1970s, Chinese exports accounted for a mere 1% of global trade. Targeted Chinese investments in transportation infrastructure and industries—the physical backbone of globalisation—reconfigured connectivity networks, advanced China's influence across Asia, Africa and Latin America, and boosted China's share of global exports to approximately 15%. Since 2013, the BRI alone has seen an estimated \$1.3trn worth of construction contracts and investments. Growing economic and diplomatic weight, in turn, has allowed China to formulate and pursue greater ambitions.

While China may have unique potential to revise the hegemonic order, it is by no means the only rising player reshaping economic or political value chains by reconfiguring connectivity networks, or intensifying “geoinfrastructural” competition. Some states seek to improve routes for raw materials or refined products to reach international markets; others work to electrify and digitise national or regional systems to partake in the global digital economy. Yet others use their geographical locations at chokepoints of global flows as strategic assets that allow them to project influence, levy transit fees, or control the infrastructures and regulatory frameworks that facilitate the movement of people, goods, money and data.

Economic corridors are often built to bypass such chokepoints and make flows more resilient to accidental or targeted disruptions. The Chinese-funded Transoceanic Railway project, for example, seeks to connect ports on Brazil’s Atlantic coast with Peru’s Pacific Ocean, offering an alternative to the Panama Canal. The Trump administration’s pivot to the hemisphere (“the Trump corollary to the Monroe Doctrine”, as the 2025 US National Security Strategy terms it) and attempts to assert greater control over the Panama Canal have increased the appeal of this alternative route for Brazil, China and Peru.

Turkey has also become a major contender in the geoinfrastructural competition, both in its own region and beyond. The Turkish-Iraqi Development Road project aims to create an alternative for east-west trade flows to the Suez Canal and the Cape route around the southern tip of Africa by linking Turkey, and eventually Europe, with the al-Faw Grand Port on the Iraq’s narrow coastline on the Persian Gulf. The port will be Iraq’s largest-ever infrastructure project and the route it serves will eventually compete with both China’s BRI and the EU’s India-Middle East-Europe Economic Corridor (IMEC). Iranian-backed factions in Iraq resist the project as it would reduce Turkey’s and Iraq’s dependence on Iran. Kuwait opposes it because it risks the viability of its Mubarak al-Kabeer port. Qatar and the UAE, meanwhile, see it as an asset and have emerged as major financiers even though the al-Faw complex would eclipse Dubai’s own main port.

Arab Gulf money and interests are also reconfiguring connectivity networks in Africa. While Western investors still hold the bulk of foreign direct investment (FDI) stock, the balance is changing. Gulf countries quadrupled their share of FDI in Africa between 2013 and 2023, from 2.1% to 8%. In 2022 and 2023 alone, they invested more than over the previous decade combined: \$114bn compared to \$78bn. In sub-Saharan Africa, the Gulf monarchies focus on energy and infrastructure sectors, including both fossil fuels and renewables, as well as air travel and ports, matching African countries’ connectivity needs and desire to diversify partners. This growing exposure, in turn, fuels Gulf monarchies’ involvement in African wars, most disastrously in Sudan.

Ties between North Africa and Turkey are also steadily deepening. While North African countries and South Africa have long accounted for most Turkish trade with the continent, now west, central and east Africa have seen the strongest growth over the past decade. The Turkish construction sector is a major driver and beneficiary of Ankara's engagement, having won contracts to build convention centres, parliaments and airports, and even replacing China in a major Ugandan railway project (though China will remain involved in the Kenyan section connecting the mineral-rich regions of the Democratic Republic of Congo (DRC) to east African ports through Uganda).

Major infrastructure projects can take decades to complete and often change shape as stakeholders' priorities shift or because of geopolitical disruptions. Some rising and middle powers' emphasis on south-south cooperation excluding Europeans (and the US), such as Brazil's recent push to create a BRICS submarine cable network, could end up laying the groundwork for a post-Western global connectivity architecture.

Europeans are not absent from the new geoinfrastructural competition. The EU's Global Gateway announcement in 2021 raised major expectations around the world, and has caused quite some disappointment since.^[1] Still, Europeans are advancing the Lobito Corridor with Angola, the DRC and Zambia as an EU Global Gateway flagship project on Africa's west coast, counterbalancing China's east African efforts. IMEC is even grander. Announced by the US, the EU, France, Germany, Italy, India, Saudi Arabia and the UAE at the G20 summit in New Delhi in 2023, the project ticked several economic and political boxes for its stakeholders, including advancing Arab-Israeli normalisation and offering an alternative to China's BRI network. Global events since then have complicated things: Israel's war in Gaza following the Hamas attack on October 7th 2023, Trump's re-election in 2024 and subsequent US tariffs that led India to ease tensions with China. Still, IMEC bears considerable potential if it comes to be realised. This and the Lobito Corridor project could show that the EU is capable of moving swiftly and flexibly to forge new geoeconomic networks in Africa, Asia and Latin America.

Purifying the West

The transition from an established order to a new one is typically driven by changes in core values, prevailing beliefs and dominant political ideas. In the current geopolitical context, these underlying shifts are visible in the growing prominence of sovereigntist politics and right-wing forces worldwide, a trend decisively accelerated by Trump's return to the White House. His MAGA movement's ambition to redefine the West and roll back liberal norms has resonated not only with far right and populist actors in Europe, but also with significant segments of Western electorates. This convergence has opened space for actors traditionally sceptical of or even hostile to the US to engage with Washington in unprecedented ways. Under the Trump

administration, they have found common cause with American counterparts, moving beyond rhetorical alignment to new forms of cooperation and exchange, including shared platforms, campaign support, elite networking and policy coordination.

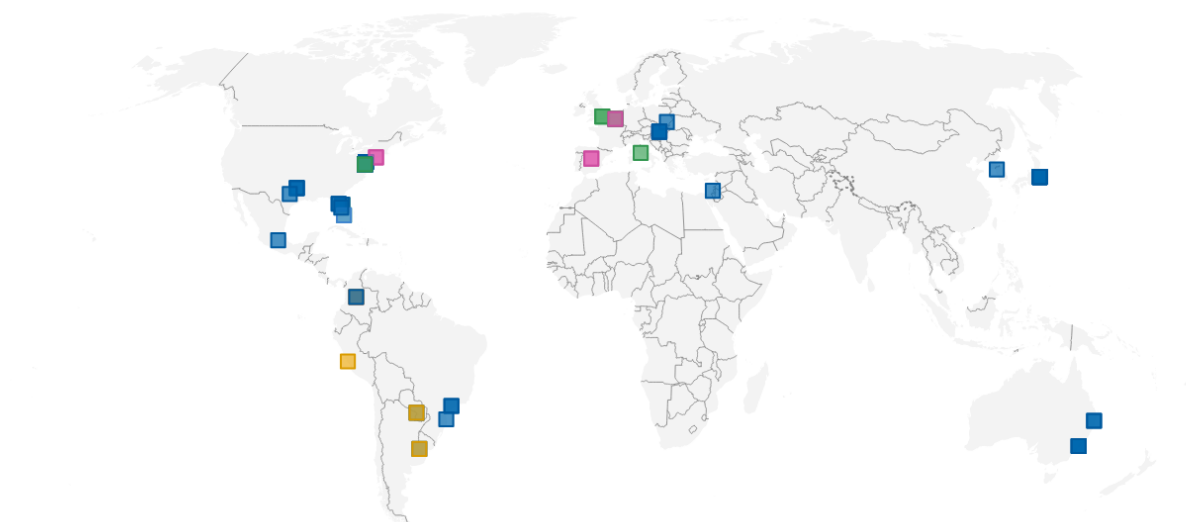
While still rooted in Western politics, this network is increasingly embedded in a dense and expanding web of cooperation among anti-liberal, nationalist and populist actors that spans regions and reaches beyond the traditional Euro-Atlantic West. By actively exchanging narratives, organisational strategies and governance “best practices”, these actors reinforce one another’s domestic agendas and help consolidate a more coherent sovereigntist ecosystem.

This dynamic is visible in the growing number of transnational forums that bring together right-wing national leaders, influencers and supportive public figures—most notably the Conservative Political Action Conference (CPAC), a US-based convention founded in the early 1970s that now presents itself as the world’s “most influential gathering of conservatives”. Other platforms—varying in structure and reach but overlapping in personnel, narrative and purpose—include the National Conservatism Conference, Foro Madrid (an initiative by Disenso Foundation, linked with Spain’s far-right party Vox) and the Political Network for Values (PNfV), which describes itself as “a global platform of political representatives and leaders committed to promoting and defending the values of family, life and freedom,” having assembled two dozen European, US and Latin American politicians on its advisory board. Meanwhile, Argentine president Javier Milei is seeking to form a “League of Conservative Nations” with like-minded leaders from other Latin American countries and in close alignment with the transatlantic CPAC community to combat “the cancer of socialism in its various forms, be it 21st-century socialism or wokeism, not to mention the more extreme versions”, as he put it.

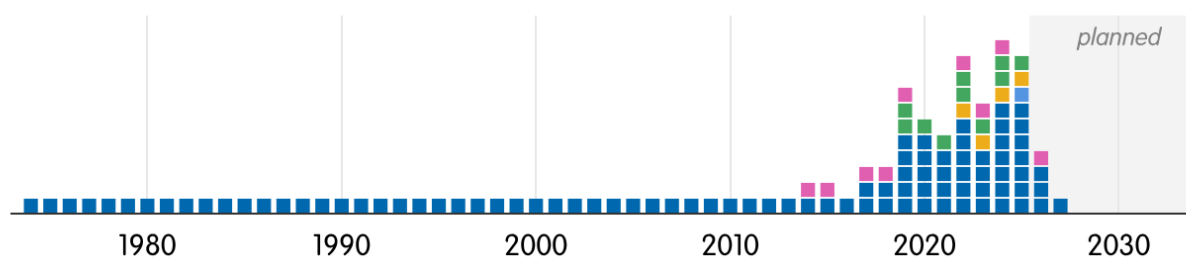
In recent years, CPAC and these other initiatives have convened regularly across the US, multiple European capitals, in Latin America, and in countries such as Japan, Australia and Israel. These gatherings bring together political parties, ideological think-tanks and prominent figures, creating opportunities to coordinate, exchange narratives and disseminate governance practices. Non-Western actors are increasingly drawn to these networks, gaining ideological validation, political support and practical templates for illiberal and anti-liberal governance. The result is not a unified bloc, but a mutually reinforcing constellation that accelerates global trends away from universalism towards exclusive, national-populist forms of governance. This dynamic is fostering the emergence of an informal illiberal international, in which cross-border ties amplify autocratic tendencies.

International locations of CPAC, NatCon, Foro Madrid and PNfV meetings. 1974-2027

■ CPAC ■ CPAC LATINO ■ Foro Madrid ■ NatCon ■ PNfV



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At its core, this transnational project recasts “the West” not as a geographic or institutional space but as a bounded cultural and moral community. MAGA-aligned actors and European right-wing populists present their agenda not as a rupture with Western civilisation, but as a return to allegedly authentic traditions, values and hierarchies—portraying liberalism as a historical aberration rather than a constitutive feature of the Western order. In this narrative, liberal democratic norms have hollowed out Western societies from within, eroding cultural cohesion, political authority and civilisational confidence.

The American vice-president, J.D. Vance, articulated this framing with particular clarity in a speech at the Munich Security Conference in February 2025. He said that Europe’s primary threat was neither Russia nor China but an internal one: its alleged abandonment of the fundamental values it once shared with the US. He accused Europe’s liberal democracies of

arbitrarily annulling elections, curtailing freedom of expression and failing to contain what he described as “uncontrolled migration”. He also attacked mainstream democratic parties for systematically excluding cooperation with the radical right, saying that European political elites were “running away from their own voters”. In doing so, Vance inverted traditional security narratives, recasting liberal democratic practice itself as a source of strategic vulnerability.

That rhetoric now appears at the highest levels of US strategic doctrine. The 2025 National Security Strategy warns of “the real and starker prospect of civilisational erasure” in Europe unless allies recover what the document terms their “former greatness” and regain “civilisational self-confidence”. At the same time, the document portrays the growing influence of “patriotic European parties” as a source of optimism and a potential vehicle for that renewal.

Only days after Vance’s appearance in Munich, Italy’s prime minister, Giorgia Meloni, echoed these themes at the CPAC in Washington. Aligning herself closely with Vance’s diagnosis, she framed the struggle over conservative values as a shared civilisational battle rather than a uniquely American political conflict. According to her account, Europe’s “ruling classes” and “mainstream media” had imported the most radical strands of American left-liberal thought, spread them across European societies and so distanced themselves from the values and norms of the “true” West.

Hungary’s prime minister, Viktor Orban, occupies a central position in this transatlantic illiberal imaginary. Long celebrated by US conservatives for his explicit rejection of liberal democracy in favour of what he terms “the illiberal state”, Orban has become a key reference point in Republican debates on executive authority, cultural politics and the limits of pluralism. His rule illustrates how the redefinition of the West functions not merely as rhetoric but as a practical template for governance.

While this reimagining of the West is rooted in intra-Western debates, its appeal extends far beyond Europe and North America. The portrayal of liberalism as a historical aberration, the emphasis on national sovereignty and the celebration of the traditional triad of “God, country and family” have resonated with right-wing and populist actors worldwide. Equally influential are the narratives of a “true people” resisting corrupt elites, opposition to “globalism” and pushback against “woke culture”—ideas that travel easily beyond their original context in the political West.

These dynamics are particularly pronounced in Latin America, where the rise of evangelical Christianity in historically Catholic societies has reshaped politics. In Brazil and elsewhere, cultural flashpoints such as abortion and so-called “gender ideology” have become central to political mobilisation, feeding global narratives of moral renewal, anti-elitism and resistance to liberal international norms. At Davos in 2025, Argentina’s Milei explicitly referenced this transnational alignment: “I have found allies in the fight for new ideas of freedom in every

corner of the world. Elon Musk, Giorgia Meloni, Bukele, Netanyahu, Orban and Donald Trump. [...] Slowly, what seemed like the total hegemony of the woke left in politics, educational institutions, the media and supranational organisations and even forums like Davos have begun to crumble, and I hope in the ideas of freedom starting to emerge”. Milei’s remarks illustrate how actors outside of Europe and North America actively engage with the narratives and networks propagated by this cross-regional sovereigntist ecosystem, adapting them to their own political contexts. Former Brazilian president Jair Bolsonaro’s post-election mobilisation in 2023 exemplifies this adaptation: by questioning the electronic voting system and mobilising supporters to occupy highways and government buildings, he sought to replicate Trump’s January 6th tactics of two years earlier—a reminder of the danger these ideas pose, even when they fail.

This redefinition of the West also recasts multilateral and regional institutions such as the UN as instruments of liberal overreach rather than legitimate platforms for cooperation. US moves such as the 2026 withdrawal from dozens of international organisations deemed contrary to American interests shows this approach in practice, favouring bilateral and ideologically aligned partnerships over multilateral engagement.

Taken together, these developments show that the rise of transnational sovereigntist networks is part of a global trend. States and movements in China, India, Russia and Turkey are pursuing their own civilisational, anti-liberal projects, combining appeals to cultural authenticity and national sovereignty with strategies to consolidate domestic authority and project influence internationally. The result is the emergence of an informal “illiberal international” that is not just a Western phenomenon but a global contestation of liberal norms and institutions. European countries are not immune. They should recognise that these trends run counter to the kinds of cooperation that best serve European interests. Nevertheless, the task for European internationalists is to rebuild support for cooperation grounded on liberal principles of inclusion, openness and accountability—and do so in ways that win broad public support.

Reclaiming governance of global public goods

The traditional model of development cooperation, in which a handful of wealthy Western countries provided grants or concessional loans to reduce poverty and provide essential services in low-income countries, is fading. Deep changes in global politics have undermined this legacy system, as it is now commonly called. Traditional donors are shifting money to other priorities such as defence, while seeking to align development policy more closely with strategic goals. The US has sharply scaled back its development funding and is reorienting what remains around narrowly-defined American interests. New donors, such as China and the Gulf monarchies, are approaching development with a more explicitly commercial mindset. And

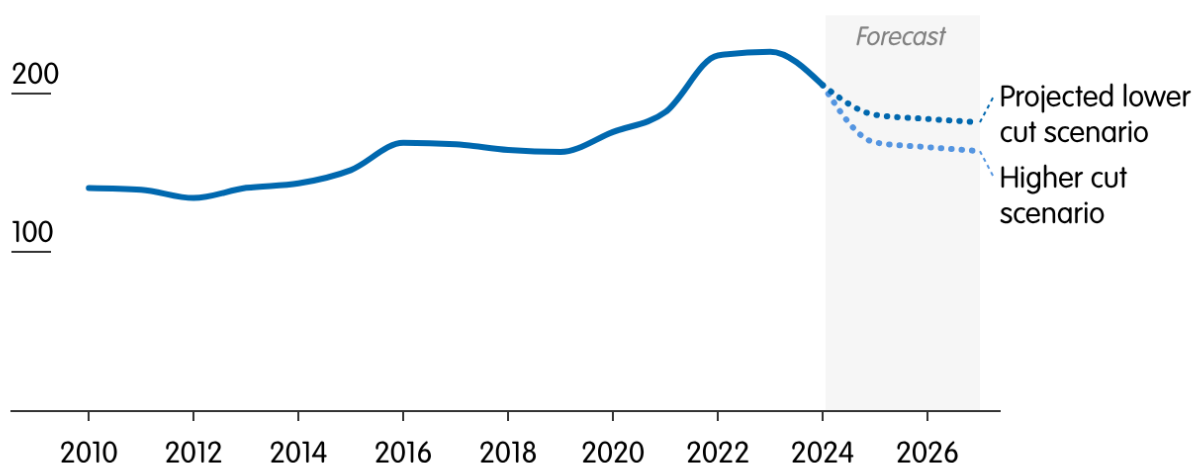
finally, countries in the global south increasingly reject the paternalism of the donor-recipient model and are seeking partnerships that give them greater agency and influence.

In recent years, developing countries have grown frustrated by the failure of Western countries to honour pledges in areas like climate finance and their reluctance to share vaccines and other urgently-needed medical goods during the covid-19 pandemic. In response, global south countries, including a number of rising and middle powers, have moved from merely asking for funding to challenging the structure and rules of the international financial system, arguing that it reflects an outdated post-war distribution of power. They are reclaiming the initiative and playing a greater role in setting the agenda on the fight against poverty, debt, health emergencies and the impact of climate change, building new global south-led alliances and movements that are beginning to reshape international cooperation in these areas.

A pioneering step came from the prime minister of Barbados, Mia Mottley, who launched the Bridgetown Initiative in 2022—a campaign aimed at highlighting the inequities of development and climate finance and calling for far-reaching reforms to mobilise greater public and private investment in developing countries. Its successes include encouraging debt-pause clauses for natural disasters and expanding World Bank funding. Similarly, Brazil used its presidency of the G20 in 2024 to launch the Global Alliance against Hunger and Poverty. The following year, South Africa in its G20 presidency promoted the themes of solidarity, equality and sustainability, with a focus on debt relief and climate finance.

Despite some achievements, these campaigns were limited by reliance on commitments from developed countries that were moving in the opposite direction. Leading European states have cut development spending, and in 2025 Trump abruptly suspended most US funding for development and global health. His move immediately halted many health programmes, especially in Africa, which scholars estimated caused over 700,000 excess deaths. The shock brought home how deeply African countries relied on external funds for basic needs and helped spur the most significant initiative so far by developing countries to reclaim sovereignty in health and development: the Accra Reset.

Net development aid from DAC* countries. 2010-2027, in \$bn



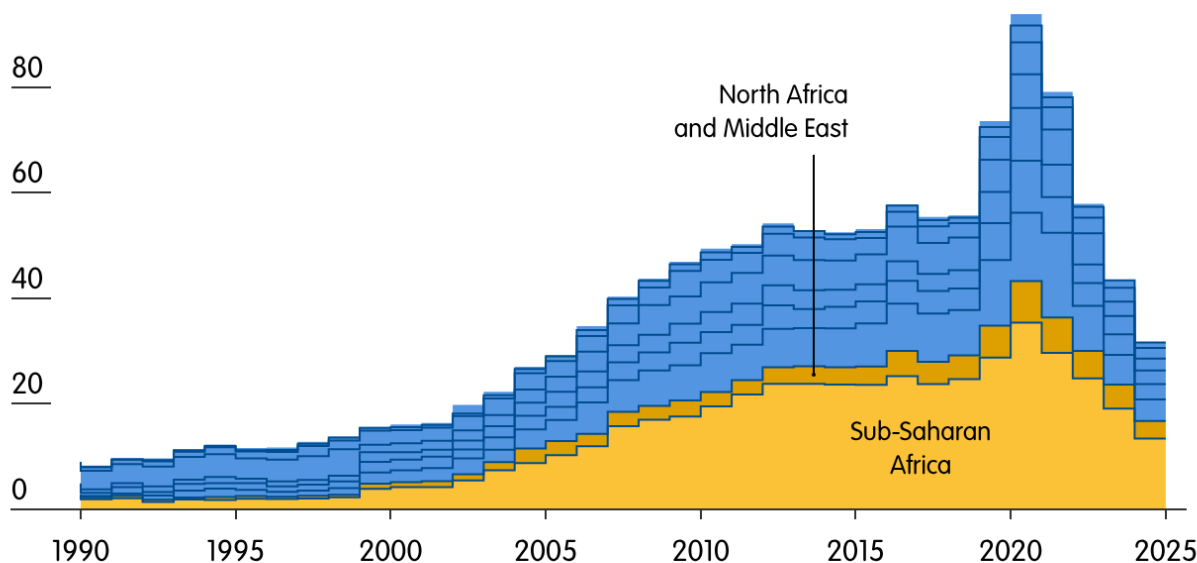
*Development Assistance Committee, or a group of major donor nations, within the Organisation for Economic Co-operation and Development (OECD). Values are in constant 2023 US\$

Source: OECD
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The Accra Reset developed out of an August 2025 summit organised by Ghana's president, John Dramani Mahama, to promote African health sovereignty. Urging a shift from dependency to self-determination, the summit set an agenda for African countries to take greater control of funding decisions, commit to domestic resource mobilisation and reform management of health systems. Moving from aid to investment has long been a goal of development policy since the Monterey Consensus of 2002 but it remains far from realised. The Accra Reset's architects claim that the best way to achieve it is through much greater ownership by developing countries, leading to comprehensive national strategies rather than fragmented donor-driven projects. The idea is that management reform, the use of local contractors and improved procurement can increase efficiency while allowing countries to focus on more clearly defined local needs.

The Accra Reset is framed as a model for a new form of development cooperation, extending beyond health and beyond Africa. It has a presidential taskforce that includes leaders active in calling for more global south influence in reforming development cooperation, including Barbados' Mottley, Brazilian president Luiz Inácio Lula da Silva and Kenya's president William Ruto. It is pitched as a response to global turbulence and conflicting interests, with a focus on business models and attractive investment opportunities rather than multilateral declarations of principles. It also calls for developing and emerging countries to direct more funding from their sovereign wealth funds and pension funds towards domestic investment. The Accra Reset is attracting more interest from Western governments as a genuinely new model than the development initiatives that preceded it.

Recipients of Development Assistance for Health (DAH). 1990-2025, in \$bn



Values are in constant 2023 US\$

Source: Institute for Health Metrics and Evaluation (IHME)
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Strikingly, the Accra Reset's approach partly dovetails with the Trump administration's new policies on global health and development. After abruptly freezing funding for development and multilateral organisations in early 2025, the administration has unveiled a global health strategy that is strongly focused on investment opportunities. It is pursuing bilateral deals with several African countries that include co-financing requirements, the promotion of American products and greater local control over service delivery. There are signs that some of the partner countries welcome the directness of this approach—it is notable that negotiations over these bilateral agreements are advancing quickly while multilateral negotiations over pathogen access and benefit-sharing provisions in the recently-agreed pandemic treaty are crawling. The EU should support greater local ownership of development goals and tailor its health and development policies to engage with this dynamic, while using concessional loans and grants selectively where they remain essential to correct for the limitations of market-driven approaches.

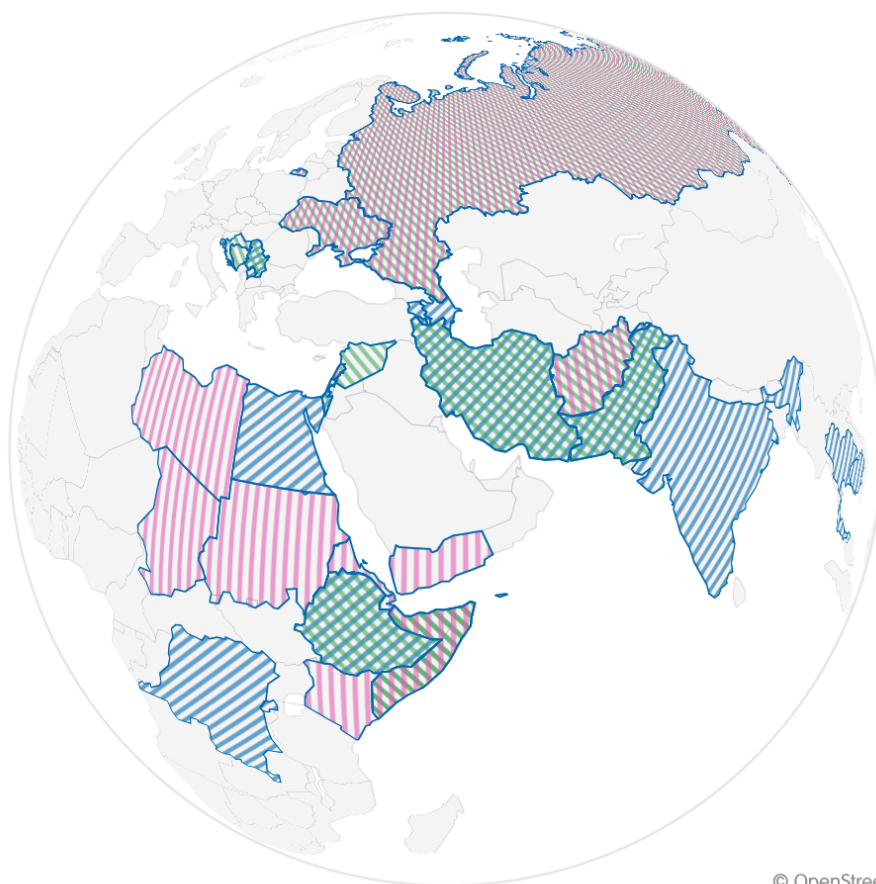
Remodelling conflict resolution

After 1989, the biggest peace agreements were mainly steered by Western countries: the Dayton Accords for Bosnia, the Oslo Accords on Israel-Palestine, the Bonn Agreement on Afghanistan and the Paris Agreement on Cambodia. However, the last two decades have seen a dramatic change in the landscape of international mediation. Geopolitical competition and increasing pushback against the Western-led international order have opened the way for a new set of middle powers to take the lead in peace-making negotiations.

These countries have used their perceived neutrality, connections across geopolitical divides and cultural affinity with conflict parties to put themselves at the centre of international peace talks, enhancing their reputation and extending their influence. Recent peace agreements are more likely to bear the names of Ankara, Doha and Riyadh than the European cities that formerly predominated.

Principal mediation and peacemaking initiatives of Qatar, Turkey and US under Trump administration

||||| Qatar ||||| Turkey ||||| US



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The rise of the new mediators is a product of a more multipolar world, where countries such as Qatar and Turkey can present themselves as interlocutors with links across troubled regions. They maintain ties with countries like Russia and channels with non-state groups such as Hamas and Hezbollah that Western countries regard as adversaries or designate as terrorist. At the same time, these rising mediators offer a different style of conflict resolution: more informal and personalistic than the process-driven approaches that Europeans typically favour. Their rise has come as conflicts become more complex and the scope for comprehensive settlements narrows.

Peace agreements no longer take place against a background of liberal order. They more often secure ceasefires or partial solutions than attempt to tackle underlying causes, and are less likely to incorporate elements of justice or democratic transition. New mediators have been

active in complex conflicts—Gaza, the Horn of Africa, Lebanon, Libya, Ukraine and Yemen—where agreements have often proved temporary or addressed specific issues such as prisoner exchanges or free passage of goods and humanitarian aid. The non-ideological, deal-making style of rising and middle powers in the mediation field fits the more pragmatic, fluid context of today's conflicts.

We can analyse the motivation, methods and track-records of these new mediators by looking at the two most prominent examples: Qatar and Turkey. Qatar first emerged as an influential mediator between 2006 and 2011, brokering a series of agreements in Yemen, Lebanon, Darfur and between Eritrea and Djibouti. Qatar's acceptability as a mediator drew on its perceived neutrality as a small state, lack of overt regional ambitions and a tradition of contacts with marginalised, often Islamist groups. Qatari mediation was led by a small circle of officials including the emir and the prime minister, and the country did not hesitate to use its wealth to sweeten deals—pledging, for example, up to \$500m for Yemen and promising significant investments in southern Lebanon. Mediation has helped promote security and stability that serve Doha's interests and proclaimed values without the good-governance and transitional-justice provisions that Western-led peace processes typically include. It also burnished Qatar's reputation as an independent and influential regional player, especially after the Arab uprisings of 2011 when its support for Islamist groups damaged its standing and helped trigger the Saudi-led boycott in 2017.

Mediation also provided a way to reinforce Qatar's indispensability to the US. The country played an essential role in the US-Taliban talks that led to the 2020 Doha Agreement, as well as 2022 talks in Chad and Libya. Since then, Qatar has also been at the centre of negotiations between Israel and Hamas over Gaza. While the country has persisted with its broad approach, there are signs that it has reduced its use of financial incentives (while remaining willing to spend large sums on facilitating talks when needed) and tried to provide greater institutional backing to its mediation teams.

Turkey differs from Qatar in that its mediation serves specific ambitions to play a leading geopolitical role in its region. Since coming to power in 2003, Recep Tayyip Erdogan and his Justice and Development Party (AKP)-led government have used peace-making to project Turkish influence on the premise that Turkey could bridge east and West, Europe and Asia. Ahmet Davutoglu, Erdogan's foreign minister from 2009 to 2014, wrote that Turkey was “located right at the centre of all the political conflicts of the surrounding regions, and is affected directly or indirectly, historically or culturally, by the myriad crises taking place throughout a wide area”. Ankara has been involved in negotiation processes in the Balkans, between Afghanistan and Pakistan, Syria, between Somalia and Ethiopia, and as far afield as the Philippines. Recently, Turkey has played a prominent role in negotiations between Russia and Ukraine, including developing the Black Sea Grain Initiative with the UN. Despite Turkey's

NATO membership, Erdogan has maintained ties with Putin and refused to join Western sanctions on Russia.

When Davutoglu was foreign minister, Turkey also promoted mediation within the multilateral system, such as through the 2010 Mediation for Peace initiative co-launched with Norway at the UN and co-chairing the Group of Friends of Mediation. However, as its regional role became more controversial after the Arab uprisings, and amid growing tensions with the West, Turkey has shifted to using mediation to enhance its strategic autonomy. Mediation allows Turkey to use its cross-cutting strategic and economic links as geopolitical leverage, and lets Erdogan assume a posture of statesmanship.

Moreover, stability in Turkey's wider region is important for its economic interests. Erdogan's offer to mediate in Yemen, where Saudi Arabia and the UAE find themselves on opposing sides, shows how Turkey uses mediation to preserve relationships between key partners. As with Qatar, Turkish efforts are driven by a small group of officials around the president, although Ankara has been gradually building up its mediation infrastructure.

A striking development of the last year is that the US under Trump has revolutionised its approach to conflict mediation, adopting and even expanding many features of mediation associated with rising and middle powers. Trump, the self-proclaimed "president of peace", claims to have ended "eight and a quarter wars" since returning to the White House. His diplomacy is intensely personalistic and informal, led by a small group of people with strong business connections, such as Steve Witkoff and Jared Kushner, often seeking quick fixes rather than comprehensive resolution of underlying problems. Trump has distanced himself from liberal values or international law as a basis for peace settlements—as in his approach to Ukraine—and seeks immediate and tangible financial benefits for the US from his deals. The Board of Peace that Trump launched at Davos without the participation of most European leaders embodies his deal-making vision of international order. There are signs that his approach has caused anxiety among Gulf and Turkish officials, who are worried about the sustainability of Trump's peace agreements. This could open the way for Europeans to step up their engagement with these new mediators, combining flexibility and pragmatism with a determination to tackle underlying grievances and build more durable settlements.

Can these new formats build order?

It is too early to tell whether rising and middle powers' strategies and activities to adapt to international disorder, hedge against its harms and seize its opportunities will coalesce into a new kind of international order. Scholars usually define orders retrospectively, in historical categories encompassing decades, if not centuries or millennia. The Paris peace conference of

1919-1920 was supposed to produce, in the words of Woodrow Wilson, a “new international order based upon broad and universal principles of right and justice”—only to quickly devolve into a mere inter-war order. Meanwhile, the post-war order born at the San Francisco conference of 1945, with the UN system at its core, has persisted and evolved for more than eight decades.

However, there are several factors that could indicate whether these new modalities will succeed. One is the balance of stakes and resources between the advocates of change and defenders of the current order. With the US under Trump advancing anti-liberal policies at the UN, in other multilateral forums and in bilateral relationships, right-wing leaders in the West and elsewhere have seen their fortunes rise. They are working to boost like-minded parties such as Nigel Farage’s Reform UK or the Alternative for Germany (AfD) in the hopes of replacing liberal governments. If they succeed, a post-liberal Western bloc would be a powerful foe to the remaining centres of liberal internationalism, akin to the counter-revolutionary alliance of conservative monarchs that sought to roll back liberal revolutions in Europe after 1848. Putin’s Russia, viewing the EU rather than the US as its main adversary today (according to the [latest ECFR global public opinion poll](#)), would likely rejoice in joining an anti-liberal cleanup in Europe, just as Tsar Nicholas I once did in the mid-19th century.

China’s counter-hegemonic project also depends on others’ support, or at least their acquiescence. This does not mean its partners must share the Communist Party’s ideology or Xi’s ambition for China to “become a leading state in comprehensive national strength and international influence”. China gains from relationships with Iran, North Korea and Russia because they distract the US and its allies and limit their capacity to counter Beijing. Similarly, Beijing struggles to manage relations with Brazil, India, South Africa and other BRICS+ countries—which are never perfectly aligned with Chinese preferences but tolerate them to sustain the coalition—but these efforts pay off. Still, it is reasonable to wonder how long the mélange of post-, non-, and anti-Western powers will hold together as the liberal West implodes.

It is also reasonable to ask whether rising and middle powers’ connectivity projects could survive a collapse of world governance. For example, if the UN Convention on the Law of the Sea succumbed to US actions in the Caribbean, Chinese land-grabs in the South China Sea and Russia’s shadow-fleeting, most global maritime traffic and undersea-critical infrastructure would be exposed to sabotage and interference, potentially wrecking a global economy that depends on [maritime transport](#) for over 80% of goods trade and on [submarine cables](#) for over 98% of data traffic. Rising and middle powers’ efforts to reconfigure connectivity through investments in maritime and transport infrastructure, such as Angola’s Lobito Corridor or the Turkish-Iraqi Development Road and al-Faw Grand Port, would become much riskier financially and geopolitically.

Climate change could also threaten some of these connectivity projects. Rising temperatures and changing weather patterns could turn them into risky business propositions. Constructing and maintaining road and railway infrastructure in increasingly hostile desert environments will become ever harder or require greater automation thus limiting such projects' ability to boost employment. Dried-up inland waterways and coastal erosion, meanwhile, challenge shipping.

Advancements in communication technology and artificial intelligence could make obsolete some strategies and enable new ones. MAGA's rise and the Rohingya genocide can at least partly be attributed to the attention economy at the heart of social media—undermining techno-optimists' prediction that universal connectivity would usher in a new age of enlightenment and global solidarity. Over the long run, the impacts of climate change and technological innovations on different regions and nations will determine which countries count among the rising and middle powers in the first place.

The current moment is one of disorder, and new forms of cooperation and alignment are emerging fast. However, it is hard to see the developments studied in this paper coalescing into a fully developed global order. Most initiatives by rising and middle powers seem geared to reinforce their positions in a more chaotic world, not to set out a concrete set of rules, norms and institutions for all states. The members of BRICS+ are bound together by their common interest in reducing the ability of the US or the broader West to constrain their freedom of action, but do not have a shared plan to replace Western leadership. China has not yet shown either the desire or the capacity to impose a global order under its hegemony, and would likely face considerable resistance if it tried. And the civilisational narrative that is at the heart of Trump's international policy, and that has found an echo in many parts of the globe, is unlikely to provide the basis of a global order based on spheres of influence. Great powers have too many intersecting interests to carve up the world neatly between them, and middle powers have the influence and agency to push back against regional domination.

Instead, the landscape charted in this survey is one where rising and middle powers pursue their interests through a patchwork of overlapping initiatives while global rules and institutions lose their normative bite and behaviour-shaping influence. As global trade rules are increasingly disregarded, countries pursue a more strategic vision of connectivity. Rather than shoring up the international system, they forge ties through corridors of infrastructure and investment that unite commercial goals with supply-chain security. The legacy development system persists but is losing funding and increasingly seems obsolete. More and more, global south countries coordinate to assert greater control over their own development paths and explore more contractual and market-based relations with developed countries. Conflict mediation is now largely detached from an overarching liberal order premised on justice and democracy, with a group of emerging powers striking pragmatic agreements to limit violence and lessen the worst harms of conflict.

Amid the disorder, these initiatives do not add up to a comprehensive programme of order-building but to local and improvised forms of cooperation. Nevertheless, they represent ways that rising and middle powers seek to expand their influence and, in some cases, contribute to yielding benefits such as conflict de-escalation, prosperity and pandemic prevention. These are goals that Europe has long promoted in the regions where it has the closest ties. The question for Europe is how to regard and how to engage with these new forms of cooperation.

How Europeans should respond

The emerging forms of cooperation and influence building outlined in this report challenge the traditional approaches of the EU and its member states. European countries have been among the principal defenders and beneficiaries of the so-called rules-based order that is fading, and European policymakers tend to hold that liberal principles remain the best foundation for global prosperity and sustainable peace. The EU's complex internal legal and procedural architecture inclines it towards process-driven forms of cooperation internationally. By contrast, the networks and initiatives that rising and middle powers are investing in are more fluid, dynamic and pragmatic than the multilateral institutions Europe has historically favoured.

Nevertheless, Europe needs to engage with the processes where its international partners are focusing their energy. If it pins its hopes only on traditional multilateral bodies, it will miss out on deals, trade links and peace agreements. While preserving collective institutions as far as possible, Europeans need to mix with emerging powers and try to influence how these new and fragmentary sources of order evolve. Traditional liberal internationalism no longer set the terms of cooperation. Yet the evidence collected in this report shows that among the risks there are opportunities for Europe too.

The counter-hegemonic bandwagoning in groups such as BRICS+ shows how widespread is resistance to Western dominance of the international system. However, European policymakers should resist the temptation to impose Trump-style loyalty tests on other countries. Instead, they should accept the reality of multi-alignment and seek pragmatic alliances and coalitions on a sectoral basis. While emerging and middle powers like Brazil, Egypt, India, Indonesia, South Africa and the UAE have a common interest with Russia and China in contesting Western global leadership, they are also likely to see Europe as a valuable partner in trade, development, climate policy and promoting regional stability. But to engage constructively with the kinds of initiatives coming from these and other emerging powers, the EU will need to learn to move more quickly, and in a more flexible way.

Europe's market size and its transparent and long-term approach to investment make it an attractive partner for infrastructure and connectivity projects. The Global Gateway shows the EU's commitment to such partnerships, but critics continue to point to slowness and a narrow focus on European priorities. Bureaucracy and risk-averse procedures and excessive attention to climate and renewable energy could undermine its appeal. To compete, Europe needs to respond to the needs and interests of its partners as well as its own, while balancing speed and mutual benefits. Europe could increase its pull as a connectivity partner by adopting a broader and more inclusive development perspective, focusing on transparency and local ecosystems.

Europe should accept a greater level of country ownership in its health and development policies, engaging with the aspirations expressed in the Accra Reset and going further to build local capacity and improve the investment environment. European countries should work with their private sectors to coordinate engagement with global-south priorities and tackle regulatory and other barriers to attracting private sector funding. Europeans should also be willing to channel more funding directly to partner countries rather than funnelling it through internationally managed projects.

In conflict mediation, Europeans should seize on signals that new mediators are looking to professionalise their engagement and seek more sustainable settlements in reaction against the short-termism of Trump's deal-making approach. European policymakers could explore new ways to work with countries such as Qatar and Turkey in solidifying their prospective conflict resolution capacities while encouraging a stronger focus on the underlying drivers of conflict.

The EU and its member states need to recognise that today's world is unfriendly to collective liberal solutions to shared problems. However, Europe does not need to give up its commitment to liberal values of cooperation, openness, accountability and inclusion. Instead of trying to build an international system that fully embodies these ideals, European policymakers should work pragmatically to engage with the centres of energy in today's international system, trying to inject such values as far as possible. In doing so, they must recognise the appeal of illiberal values and the new networks based on them, within the West and beyond.

To give renewed purchase to international cooperation, Europeans should focus on practical results and mutual benefits rather than system-building. By doing so, they stand the best chance of expanding Europe's influence in a multipolar world and win domestic consent for the kind of international engagement that best serves European interests. Such an approach is not likely to produce a new global order any time soon, but it is the best way for Europe to chart a path in a disordered world.

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[1] Authors' interviews with experts and policymakers in several countries of the global south over the summer of 2025, as well as in autumn 2023 for the "Multilateral Matchmaker" special.

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