

Global Block Formation? Implications of the New World (Dis)Order for Europe

Six scenarios for international power configurations in 2035



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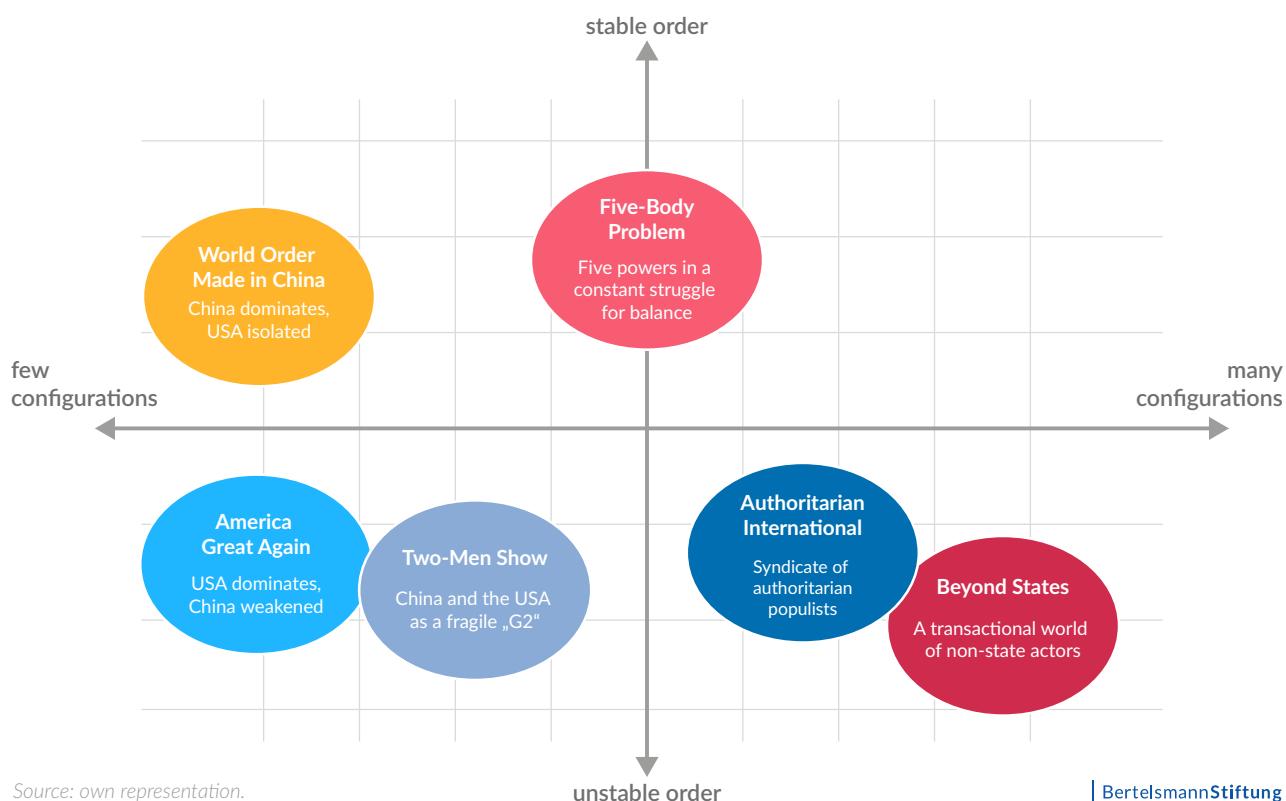
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Executive Summary

The world (dis)order is undergoing a transformation with an uncertain outcome: What international configuration of power could the EU face in 2035, and how can it prepare for this? In a scenario process with the Fraunhofer Institute for Systems and Innovation Research ISI and experts from business, academia and politics, we have mapped out six conceivable configurations that differ in terms of the number of centres of power and the degree of stability:

- **“World Order Made in China”**: China has established itself as the hegemonic power over the United States and dominates the world order.
- **“America Great Again”**: The United States dominates the world order again, acting autocratically and often erratically under the influence of the MAGA movement.
- **“Two-Men Show”**: Two powerful blocs, China and the United States, face each other in a fragile balance.
- **“Five-Body Problem”**: A polycentric world order with five largely self-sufficient, protectionist power centres – the United States, China, Russia, the EU and India.¹
- **“Authoritarian International”**: An authoritarian-populist power structure, supported by personal diplomacy and ideological proximity.
- **“Beyond States”**: A world in which state authority is waning and non-state actors are shaping the global order.



1 This scenario was inspired by the concept of “pentarchy” coined by the German political scientist Herfried Münkler in 2023 (see Münkler 2023). The title of the scenario is a tribute to the science-fiction trilogy *The Three-Body Problem* by Liu Cixin.

The scenarios are not intended as forecasts but stimuli for strategic reflection on long-term developments in the global order. They show the range of possible future paths over the next ten years and highlight the importance of addressing change proactively.

In addition to scenario-specific fields of action, four so-called “robust” fields of action can be derived from the scenarios, which apply across all scenarios. Implementing these measures could put the EU in an “optimal” position in 2035, regardless of the scenario. This position describes the EU’s ability to prove resilient and to, at least partially, retain its independent capacity to act in a certain international power configuration. These scenarios highlight the urgent need for action. They make it clear: Inaction will have consequences. The EU could break apart, be worn down or simply become irrelevant as a geopolitical actor.

Fields of action applicable to all scenarios

1. Improving decision-making procedures and expanding “minilateralism” and partnerships

Regardless of the future configuration of power: If the EU wants to retain its capacity to act, it should organise its decision-making procedures more effectively and overcome blockages. The ideal approach would be comprehensive governance reform, which is, however, difficult to implement politically. This is why minilateral arrangements – i.e. flexible coalitions of a small number of states – are gaining in importance to remain capable of acting even when the remaining EU structures are blocked. To ensure that such situational behaviour does not result in arbitrariness or opportunism, a common set of values is needed as binding policy guidelines. At the same time, strategic alliances with (like-minded) third countries should be specifically intensified to strengthen Europe’s international influence.

2. Strengthening defence capabilities and providing effective deterrence

Strengthening the EU’s defence capabilities is essential to survive as a geopolitical actor. This requires the expansion of joint structures, processes and resources as well as better interlinked foreign and security policies. Key elements are deeper integration of national armed forces, close European armaments and innovation co-operation with harmonised standards, strengthened intelligence services and shared situation analysis. Increased defence investment would significantly strengthen Europe’s ability to provide conventional deterrence. They would also create better conditions for nuclear deterrence, although its credibility and further development remain dependent to a much greater extent on political and practical conditions that go beyond purely financial efforts. Coordinated interaction with NATO remains just as crucial as a deeper understanding of other regions of the world and their political, institutional and social dynamics.

3. Creating and actively utilising economic and technological resilience

The EU should systematically identify and prioritise critical key industries, markets and technologies to ensure its strategic capacity to act. A central concept is “strategic indispensability” – the deliberate creation of dependencies that secure the EU’s position in the long term. At the same time, it is important to promote flexibility and innovation: Markets should be consistently monitored, options kept open, and a culture of risk-taking encouraged. The positioning in market and technology niches should be strategically focused. The development of technological ecosystems can also help achieve technological leadership and/or sovereignty in certain sectors.

4. Strengthening cohesion and developing a narrative for the future

Social cohesion and acceptance are prerequisites for any successful transformation. This is why inspiring, credible and compatible narratives for the future need to be developed – especially on the question of what constitutes a good life in a changing world. Such visions help promote understanding for the burdens of reform, to bridge transitional phases (“valleys of tears”) and create a collective focus on long-term goals.

Overview of the scenarios for 2035

World Order Made in China

China dominates the global order in a Sinocentric system with reformed international institutions that function according to Chinese rules. The global economy is dependent on the Chinese market and its technological leadership – especially in green tech and digital infrastructure. China avoids concrete security guarantees and relies primarily on economic pressure, digital control and technological surveillance. Traditional alliances such as NATO are fading. Multilateral forums are now merely stages for China to showcase its power.



America Great Again

Following China's economic collapse, the global order is once again unipolar and is dominated by the autocratic, hegemonic United States, which asserts its interests unilaterally and often in erratic ways. The global economy is realigning itself with the United States, while China is being marginalised as a production location; technological supremacy is clearly in American hands. Security alliances such as NATO are losing importance, while multilateral institutions under the United States' influence are acting on an ad-hoc basis.



Two-Men Show

The bipolar world order has become a reality: China and the United States dominate as fragile “G2” powers, relying on informal deals and personal power balances. Economically, two ecosystems have emerged with decoupled value chains in which resource control determines trade. International security is tense, especially in third regions, while multilateral organisations continue to exist formally but are undermined or instrumentalised by the G2.

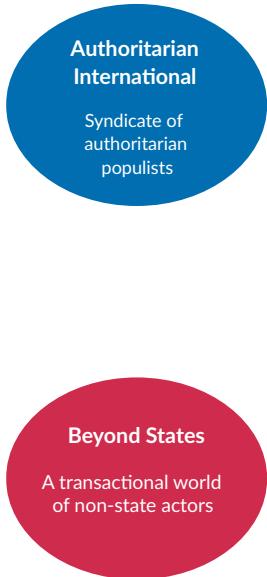


Five-Body Problem

Five centres of power – the United States, China, Russia, India and the EU² – keep each other in check and maintain balance through an exclusive security council, the “W5”. Economically, the blocs are strongly focussed on self-sufficiency, with intra-bloc supply chains and protectionist measures. Security issues are negotiated in changing coalitions, international organisations such as the UN are disempowered.



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Authoritarian International

A global network of illiberal and autocratic governments has displaced the liberal world order. It is replaced by an authoritarian-populist power structure based on personal diplomacy and ideological proximity. The global economy is corruption-driven, hierarchically organised and reactionary, with a strong focus on national production and fossil fuels. Global security structures have disintegrated; hybrid attacks and regional conflicts are on the rise – international organisations no longer play a role.

Beyond States

In this world, the global order has dissolved into a chaotic network of non-state actors, while state authority is waning. Economic power is heavily centralised in the hands of a few private parties, trade structures have collapsed, and alternative currencies dominate. The security situation is precarious; wars are waged by mercenary troops and international organisations hardly exist as formative bodies.

Thinking in scenarios – to prepare today for the world (dis)order of 2035

The geopolitical landscape is undergoing profound change. Political, military and economic alliances that have long been considered stable – for example between Europe and the United States – are coming under pressure or eroding. At the same time, new partnerships are gaining in importance, such as the growing cooperation between Russia and China. The systemic conflict between democratic and autocratic models has reached European soil with Russia's attack on Ukraine. China's economic rise without political liberalisation is exacerbating the conflict and has led to increasing economic decoupling in its rivalry with the United States.

New international power configurations are emerging in this environment. While some actors are trying to bind other states more closely to their own interests, countries in the “Global South” are striving for greater strategic independence. States like India and regional associations such as the Association of Southeast Asian Nations (ASEAN) are positioning themselves more confidently and pursuing flexible, transactional foreign policy approaches.

What configurations will emerge from this fluid “world (dis)order” by 2035 remains to be seen. For Europe, which has long benefited from a rules-based order, this change means increasing uncertainty – and the need to actively shape its role in a newly forming world order.

The complexity and uncertainty of these developments pose considerable strategic challenges for politics, business, academia and civil society. Scenarios offer a structured framework for analysing possible paths to a world (dis)order in 2035, identifying risks and opportunities at an early stage and providing guidance for future-oriented action.

For this reason, the Bertelsmann Stiftung worked with the Fraunhofer Institute for Systems and Innovation Research ISI to conduct a scenario process in 2025 to systematically identify possible international power configurations in 2035. The results aim to inform decision-makers in European and German politics, businesses, civil society actors and the interested public.

The aim of the scenario process was to gain well-founded insights into what the world (dis)order could look like in ten years' time and to derive fields of action for politics, business and civil society. An essential part of the process was a series of workshops with experts and stakeholders from politics, business and academia. Six scenarios of international power configurations in 2035 emerged from the process:

- **“World Order Made in China”:** China has established itself as the hegemonic power over the United States and dominates the world order.
- **“America Great Again”:** The United States dominates the world order again, acting autocratically and often erratically under the influence of the MAGA movement.
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- **“Authoritarian International”:** An authoritarian-populist power structure, supported by personal diplomacy and ideological proximity.
- **“Beyond States”:** A world in which state authority is waning and non-state actors are shaping the global order.

Five of the scenarios emerged directly from the workshops with experts and were developed by the project team into consistent narrative visions of the future for the year 2035. The scenarios are based on a systematic analysis of key drivers of global order development – such as power shifts, technological transformation and economic dynamics – and were reviewed with the participants in terms of their plausibility, relevance and internal logic. The project team subsequently added the “Authoritarian International” scenario.

Based on these scenarios, the participants discussed opportunities, risks and the possible position of the EU. From this, fields of action were derived, the implementation of which forms the prerequisite for the “optimal position” of the EU in the respective scenario. The optimal position describes the strategically most favourable position in a scenario, in which the EU can protect its interests, limit risks and exploit opportunities. It stands for capacity to act, resilience and creative strength under the respective framework conditions of the global order. “Optimal” is to be understood in the context of the respective scenario. There are scenarios that are unfavourable for Europe per se. In these cases, the optimal position is not an ideal situation, just the best possible one.

Based on a comprehensive literature analysis, two key factors influencing possible developments in the global order were identified:

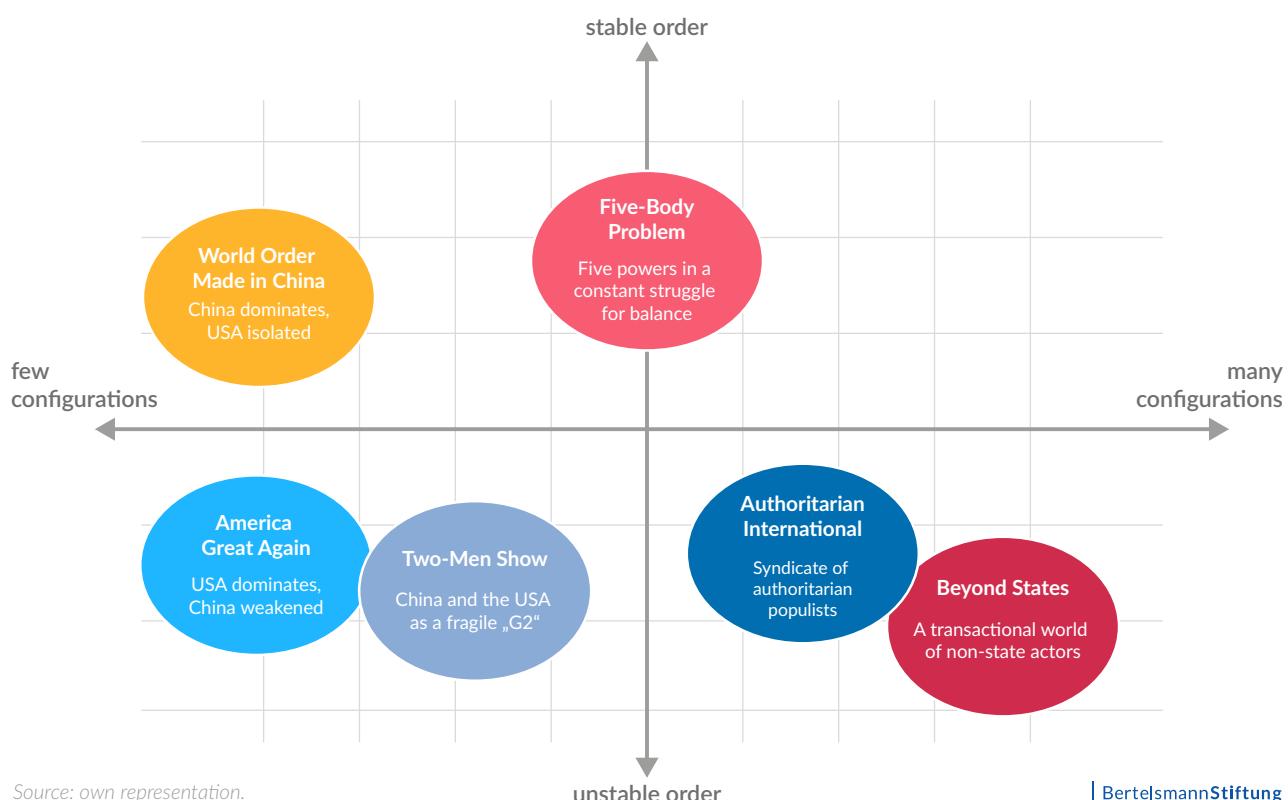
1. the number of dominant power configurations and
2. their stability.

These factors form the axes of the scenario space. This is the conceptual playing field on which alternative visions of the future emerge, structured by the most important factors influencing a development. The positioning of the scenarios in the axes represents a snapshot (see figure below). For a detailed description of the methodological approach, see the appendix.

The six scenarios developed are not concrete forecasts but are intended to serve as food for thought in a discussion of long-term fields of action. They also provide a basis for strategic considerations. They illustrate how diverse possible development paths might turn out to be in ten years' time, thereby emphasising the need to engage intensively with the future and changes in the global order, e.g. through

- embedding the scenarios in strategy processes alongside visions and roadmaps,
- identifying indicators for monitoring geopolitical developments, and
- regular discussion of the scenarios, for example in workshops or brainstorming sessions.

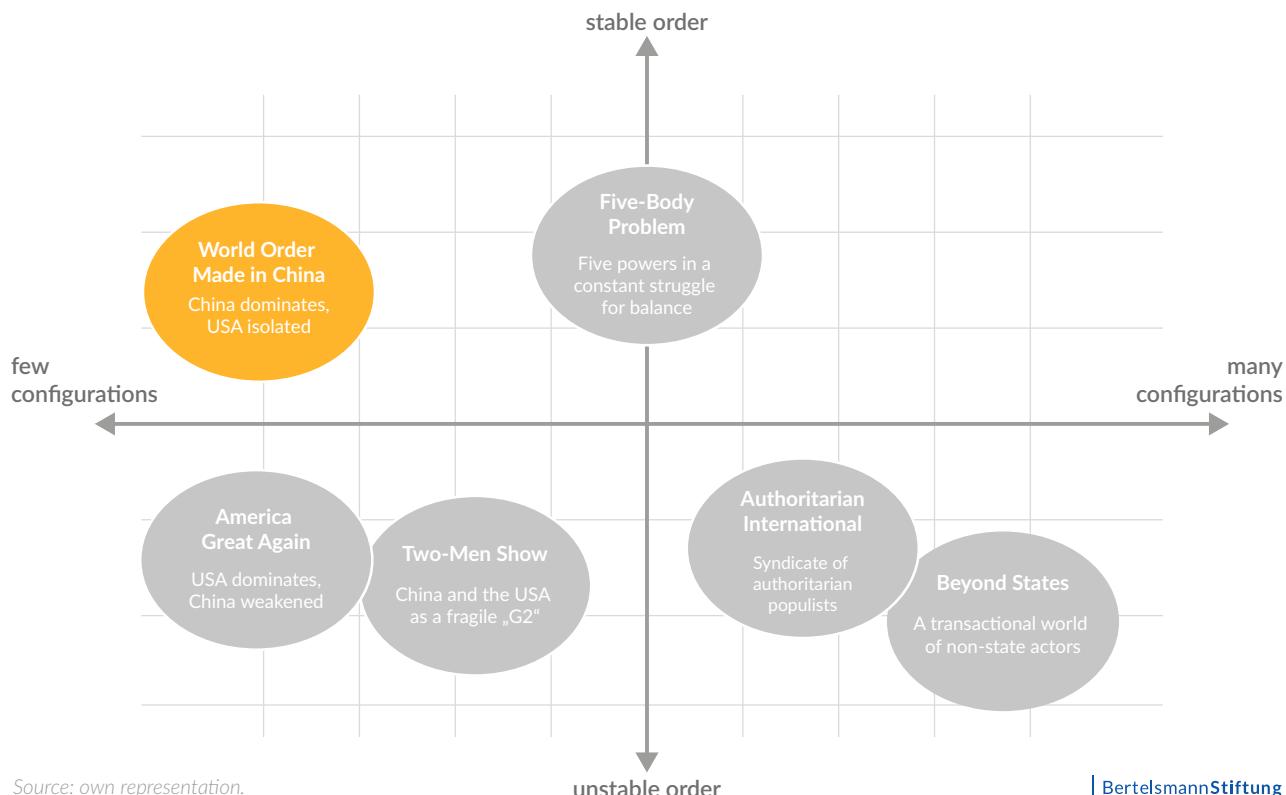
This turns the scenarios themselves into a tool for the “early coordination” of expectations and strategies – and makes a concrete contribution to the future viability of the EU and Germany.





Scenario 1: World Order Made in China

China dominates, USA isolated



World News 2035

New UN headquarters opens in Beijing

World News 2035

Blackout in Europe – China cuts off power after incident escalates

Situation in 2035

 From China's perspective, China has risen to its former greatness, while the United States has grown increasingly isolated. Other actors arrange themselves in concentric circles around the new centre of power – a Sinocentric system. The EU is in the outermost circle. Global governance has changed significantly under Chinese influence: Institutions such as the UN, the WTO, the IMF and the World Bank continue to exist, but have been reformed according to Chinese guidelines, in some cases with headquarters relocated to Beijing. Their meetings resemble staged forums that demonstrate China's claim to leadership. At the same time, China is strengthening its regional presence through organisations such as the Shanghai Cooperation Organization (SCO) and the Asian Infrastructure Investment Bank (AIIB). Supra-regional coalitions, for example between China, Russia, Iran and North Korea (CRINK) or within the BRICS states (Brazil, Russia, India, China, South Africa), further support China's claim to hegemony. Traditional Western coalitions such as NATO, on the other hand, are losing importance.

Global order

China is shaping the global order, while Western alliances are losing influence and international institutions are following Chinese guidelines.

Stability is guaranteed above all by the spheres of influence of individual powers, such as Russia, which ensure a limited order in certain regions.

Many states' technological dependence on China leads to a de facto lack of alternatives, which further strengthens Beijing's influence on international institutions. At the same time, tensions arise: China's global outreach – the expansion of its economic, political and technological influence – is changing existing power relations and creating uncertainty. In addition, the United States, although marginalised, acts as a "thorn" in the global system and repeatedly triggers disruptions with unpredictable actions.

Security and conflicts

China dominates through economic pressure and digital control. The United States remains a constant disruptive factor.

 When it comes to security issues, China relies primarily on economic pressure and avoids direct security guarantees. Military means are only used in exceptional cases. The main centres of conflict are Indo-Chinese relations and in non-conventional sectors such as outer space, cyberspace and the deep sea. In this context, China and the United States are competing in a "zero-sum game", with the United States acting as a constant disruptive factor.

China has perfected the surveillance state with the help of artificial intelligence (AI) and exported it worldwide. WeChat and other Chinese apps have almost completely supplanted their Western counterparts (except in the United States) and are inextricably linked to everyday life, censorship and control. Outside of China, anyone who opposes core Chinese interests risks sanctions based on the data collected by these apps. Despite comprehensive surveillance, however, social tensions continue to arise, even in China itself, for example over the treatment of national minorities.

Economy

China's technological dominance and global RMB usage are creating high dependency, with "Produced in ASEAN, designed in China" as leading model.

 The world is completely dependent on trade with China – even in the high-end segment. Global value creation has largely shifted to China and its regional partner countries. The renminbi (RMB) has developed from a regionally dominant currency into a global reserve currency, while Chinese government bonds are regarded as a safe and sought-after investment by international investors.

The ASEAN region in particular benefits from its close division of labour as a production location, while the upper segments of the value chain, such as research and development or design, take place in China – reflected in the slogan "Produced in ASEAN, designed in China". When it comes to the EU, value creation has also been completely reversed in some cases: European companies act as suppliers for China. "Designed in Shenzhen, assembled in Stuttgart" is now a reality.

Another point of note is the high-end value creation in the Chinese armaments industry and China's dominance in infrastructure, particularly in the ASEAN region.



China leads in key technologies such as AI, quantum technology and semiconductors as well as in raw materials production and green tech. More and more innovations are originating in China, which is acting as a global innovation hub and magnet for highly efficient international skilled labour. To secure its leading position, China is also trying to contain the technological development of other actors. At the same time, China's technological dominance is creating new dependencies that could lead to security policy risks for other states.



China is playing a leading role in the green transformation. In contrast to the United States, which lacks any strategy to counter the national consequences of climate change, combating climate change is of enormous importance to the Chinese government, as China is also suffering greatly from the effects of global warming and environmental degradation. China's leadership uses the stage at international platforms such as the Conference of the Parties (COP), but usually no concrete solutions are found. Instead, decisions tend to be made in smaller bilateral or multilateral groups and only communicated to the rest of the world afterwards.

Innovation and technology

China is a global innovation hub for green tech, AI and semiconductors. Technological dominance is actively secured.

Environment and climate

China is promoting the green transformation, often unilaterally or in small groups, while international climate cooperation is stagnating.

Strategic implications for the EU

Risks

In this scenario, the EU is primarily exposed to risks due to the loss of political and technological influence, declining economic autonomy and the gradual erosion of liberal values. The EU would lose importance as a political actor and be increasingly dominated by individual member states, competing with each other to establish independent relations with China, and thus significantly weakening the EU's capacity to act and creating new dependencies.

There is also a risk of considerable technological losses if key technologies and large parts of the value chain come under Chinese control. This could lead to an exodus of skilled labour to China, the abandonment of European industrial standards and the growing influence of Chinese actors on European companies.

The loss of economic independence is likely to worsen if surveillance infrastructures are established at the same time. In particular, the digitally supported extraterritorial surveillance of Chinese citizens within the EU, but possibly also of EU citizens in third states, harbours risk for the social climate and is putting increasing pressure on liberal democratic values.

Opportunities

In this scenario, the EU faces limited opportunities to establish an independent international position – which is heavily dependent on China's behaviour. A self-confident Chinese hegemon could allow different political systems to coexist peacefully. In this environment, the EU could emerge as the last bastion of a rules-based order and functional, interest-led multilateralism – and thus once again become attractive as a strategic ally for third states.

China could also indirectly promote a further deepening of the EU single market, for example through geopolitical pressure. This could stabilise the EU. At the same time, the EU might pragmatically accept certain authoritarian influences from China, provided that long-term security and political support are guaranteed. As China is severely affected by climate change impacts, climate and environmental policies could become joint priorities and lead to Chinese investment in sustainable European infrastructure.

Even if the strategic relevance of the internal market for the EU would decrease drastically in this scenario, a diverse EU internal market could remain economically attractive. This would also be in China's interest as long as China's geopolitical agenda and its leadership role are not jeopardised as a result. In view of China's demographic development, the EU could become a global hub for skilled labour.

Optimal position

In this scenario, the EU occupies an optimal position if it can assert itself as a "Gallic village", i.e. as an, at least partially, independent actor in the Sinocentric power structure – with a strong, united internal market as its "magic potion". In this context, it is largely on its own, needs to act strategically self-sufficiently and become capable of defence. At the same time, however, the EU has proven itself to be a reliable partner in bilateral and trilateral coalitions (minilateralism) and has been further strengthened as a result. Thanks to the size of its internal market, the EU remains a relevant international actor, concluding trade and investment agreements with China and securing limited access to critical raw materials. However, access to the Chinese market remains a permanent point of conflict.

Measures to achieve the optimal position

At an economic level, key industries that are vital for survival (e.g. telecommunications, railway infrastructure, energy supply, aerospace) should be systematically promoted and protected. Simultaneously, the systematic positioning in strategic niches such as specialised machinery or luxury goods should be pursued. An independent European tech ecosystem should be established today – keyword "["EuroStack"](#)" – as any delay would render such ambitions unfeasible in this scenario. At the educational policy level, it should be examined whether the Chinese language should be included as a compulsory subject in school curricula, given China's strategic importance in the global context.

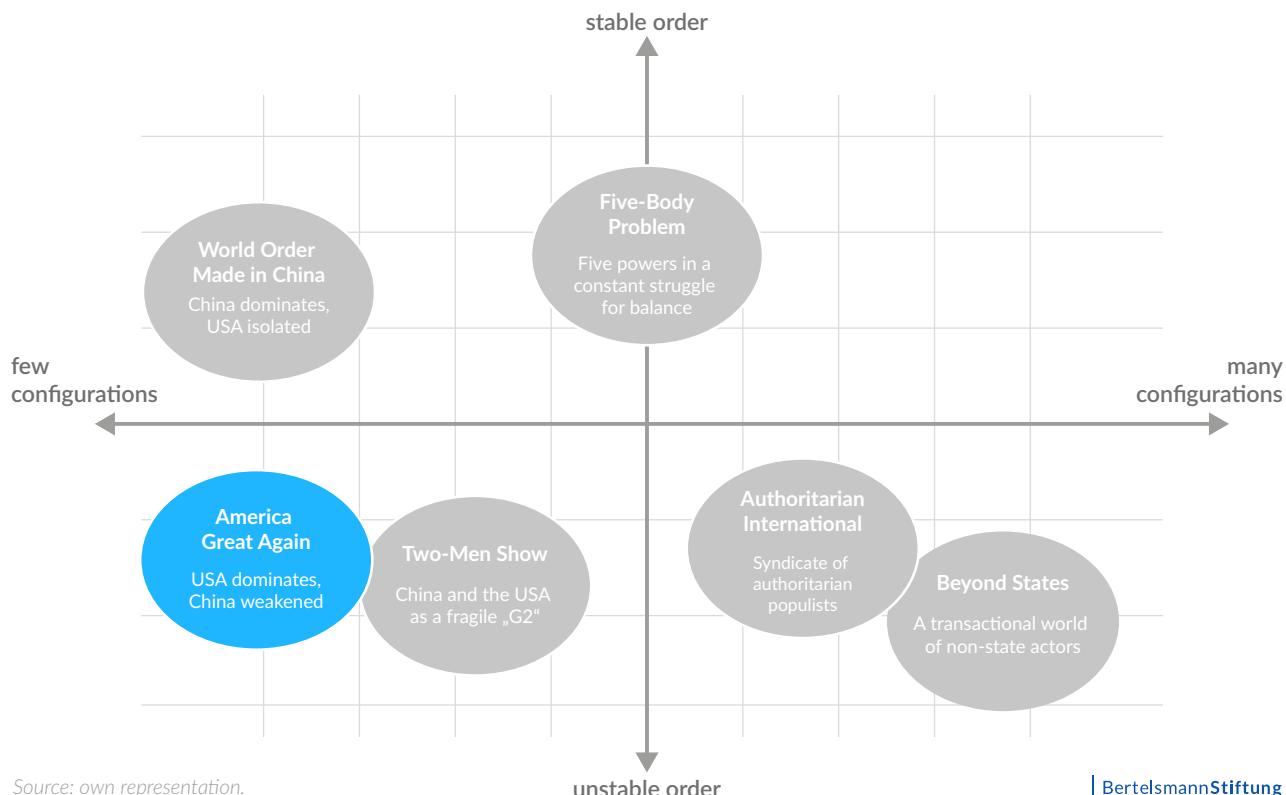
In terms of security policies, the development of a European security architecture with clearly defined standards and norms should be prioritised. This requires the integration of national armies to lay the foundations for co-ordinated European armed forces. To strengthen self-sufficiency, critical raw materials should also be extracted more intensively in Europe to reduce strategic dependencies and ensure capacity to act in terms of security policies. It is important to clarify which raw materials are needed in the long term, who can extract them in Europe and how economically viable their production is. In addition, strategic partnerships could be established with politically stable countries that are considered trustworthy.

At the institutional level, the EU governance system should be revised with a focus on decision-making processes and resolution procedures. The aim is to enable more frequent voting by qualified majority and, at the same time, to create a mechanism for excluding member states to prevent security risks, such as from potential "Chinese sleeper agents". At the same time, diplomatic and strategic initiatives should be pursued to persuade the United Kingdom and other states, if applicable, that have left the EU to return. In certain sectors, the EU could also take a leaf out of China's book and act as a "Chinese model pupil" – for example, by establishing state-owned banks or negotiating sector-specific trade tariffs, such as in the field of electromobility.



Scenario 2: America Great Again

USA dominates, China weakened



Source: own representation.

BertelsmannStiftung

World News 2035

German industrial exports reach new record high

World News 2035

The United States declares climate change to be over

Situation in 2035



In this scenario, the Chinese government fails to overcome its profound economic and social problems. The Communist Party has lost its legitimacy and is facing an existential crisis. The fact that the United States has forced its trading partners to choose between the United States and Chinese markets has also contributed to this. As a result, the global order in this scenario is (once again) dominated by the United States, which is acting autocratically and often erratically under the influence of the MAGA movement. Their dominance is primarily based on military strength and financial superiority. The latter is fed by an almost complete re-dollarisation of the international financial system.

Global order

After China's collapse, the United States dominates as an authoritarian superpower. International institutions are US-dominated or meaningless.

China's economic and social system has failed and is severely weakened. The country is suffering from high levels of debt and stagnating growth. The Communist Party is at risk of disintegrating and losing governmental power. Although a military coup is considered unlikely, a power struggle is raging within the armed forces – calls are growing among the military elite for a new social model to overcome a massive debt crisis.

Since a weakened China no longer represents a viable alternative, most countries are once again turning to the United States. In the economic orbit of the United States and without the competitive pressure from China, the EU is experiencing a phase of revitalisation. Due to the military superiority of the United States, its role as global hegemon is accepted internationally for pragmatic reasons – partly out of necessity.

The global order is characterised by loose coalitions rather than firm alliances. Trust between states is dwindling. International organisations such as the UN are growing less important, but continue to play a role, particularly in the areas of health, climate, development and migration. They often act on an ad-hoc basis and under the United States' dominance. In many fields, the United States is increasingly imposing regulations and standards beyond these structures and in accordance with its own interests. The United States is also filling gaps left by China, for example by taking over unfinished Belt and Road Initiative (BRI) projects.

Security and conflicts

The US is focussing on military strength, regional orders are disintegrating and international law is being ignored. Migration and resource conflicts are increasing as a result of Chinese weakness.

 The loss of rules-based structures and the declining influence of international organisations and coalitions as confidence-building bodies are making the global security situation much more precarious: Sources of conflict, tensions and security issues are coming to the fore. Humanitarian and international law hardly play a role in conflict resolution. Russia remains imperialistically ambitious despite its weakness. The United States' attempts to actively curb the development of other countries and to maintain or increase economic and technological dependencies on the United States also have a destabilising effect. Competition for resources is exacerbating tensions between large and small countries.

The United States exploits its hegemonic position, regularly gains advantages at the expense of other countries and only promotes stability where the United States has interests in trade and resources. In China, the consequences of climate change are leading to migration to neighbouring countries in many rural regions, causing old conflicts to flare up again. Russia and India are exploiting China's weakness to enforce old border demarcations. As the distance between countries grows, regional coalitions such as NATO become less important – there are no longer any alliances in the defence sector, only relationships of dependency.

Economy

Technology control and dependencies secure US supremacy. The decline of China creates opportunities for India, Southeast Asia, Africa and Europe.

 Value creation in the global economy is undergoing profound changes.

With the demise of competitive pressure from China, new opportunities are opening up for other countries, while China remains an attractive market due to its large population. With the demise of state subsidies and investments in China, new investment opportunities are arising for foreign investors. A new Singapore could emerge if Chinese production sites are run independently or by foreign investors. The production of simple mass-produced goods is increasingly shifting to South East Asia and partly to Africa.

The complementary economic integration between the United States and Europe is high, based on data economy and AI from the United States and competitive Industry 4.0/5.0 in Europe – now both without competition from China. The United States uses its economically and militarily dominant position to redirect value

creation in its favour, especially in the high-tech sector (picking the raisins). They enforce control over the remaining high-tech sites and thus induce a high degree of dependency in other countries.

 The United States pursues exclusively national interests and focuses on research and development, especially in high tech and AI, which consolidates its technological superiority. In addition, the brain gain generated by Chinese emigrants to the United States strengthens their innovative power. Other hotspots for innovation are Japan, South Korea and India. The concentration of industrial production in Europe in turn strengthens the European economy but also creates further technological dependencies on the United States. In addition, both the United States and the EU are utilising China's existing production capacities and expertise to expand their respective strengths.

 A decrease in CO2 emissions in China will have a positive effect on global emissions in the short term. However, the long-term consequences of the climate crisis remain. Technologically advanced, highly habitable regions use their power to mitigate climate impacts and redirect resources. This divides the world into prosperous, highly habitable regions and severely affected, uninhabitable areas. Climate-induced migration is correspondingly high – both from rural regions to urban centres (e.g. due to the deterioration of infrastructure) and towards Europe and the United States, which are also affected by the climate crisis, but less so than the southern regions.

Responsibility to protect the climate is unevenly distributed: Some countries are in a position to take active measures, while other – especially less developed – regions are suffering particularly badly from the consequences of the climate crisis. This inequality is fuelling tensions and conflicts as the countries affected fight for resources and support. Africa is massively affected. However, the end of geopolitical competition between China and the West is creating new opportunities to make a strong contribution to combating global climate change through technological pragmatism and a focus on its own markets. Now that China has ceased to be a major emitter, climate protection hardly plays a role for the United States, which has a considerable negative impact on international cooperation in this area. Nevertheless, in the spirit of “America first”, the United States is securing access to raw materials that are crucial for the green transformation, worldwide and at any cost.

Innovation and technology

The US is leading in technology, strengthened by the brain gain from China. Innovation is focussed on the United States, Europe, South Korea, Japan and India.

Environment and climate

Climate protection is losing relevance. The United States is focusing on securing resources and pursuing national interests, while global climate migration and inequality are intensifying.

Strategic implications for the EU

Risks

In this scenario, the main risks for the EU are economic setbacks, political uncertainty and the loss of autonomy. European companies that are heavily dependent on the Chinese market for their sales policy would be particularly affected by China's failure – the loss of China as the second largest export market could cause considerable losses.

At the same time, an economic revitalisation of the EU may harbour new risks: A growing trade and export surplus could increase the EU's dependence on global markets and thus its vulnerability to international political tensions. The sole dominance of the United States could in turn destabilise the political climate, especially if American foreign and economic policies become increasingly one-sided, arbitrary and therefore unpredictable. At the same time, Europe is threatened with considerable economic losses, for example due to the introduction of high tariffs and protectionist measures that burden supply chains.

In this environment, rules-based regulatory and governance structures could become less important. Free trade would be under pressure as individual states could increasingly rely on their own standards and non-tariff trade barriers. A stronger MAGA movement in the United States could lead to a relaxation of technological regulation – with potentially detrimental consequences for the EU, which adheres to common standards. At the same time, the growing dominance of the United States harbours the risk that the EU will lean too heavily on Washington, both politically and economically, thereby losing its own strategic room for manoeuvre and independence.

Opportunities

However, China's collapse would also present some opportunities for the EU – particularly in terms of economic development and strengthening the Western model of democracy. Without the intense pressure from Chinese competition, exports from the EU could get a boost. Formerly economically strong countries such as Germany would have the opportunity to build on previous successes in key industries such as mechanical engineering. The EU member states could continue to serve the large Chinese sales market to a certain extent. At the same time, the EU could benefit from an influx of highly qualified skilled labour from China (brain gain) who are looking for new scientific and technical fields of activity in the EU.

A weak China, which no longer has much to offer economically, would lose Russia as a close geopolitical partner. This could make it easier for the EU to act more confidently and decisively towards Moscow. New dynamics could develop in the EU's relations with countries in Africa and Central Asia, while the partnership with India could gain in importance and be strengthened as a result of the decline in Chinese dominance.

Optimal position

The EU has achieved an optimal position in this scenario by successfully expanding and stabilising, strengthening its military capabilities and developing mechanisms and instruments to respond quickly and reciprocally to third-party trade barriers. At the same time, the EU is gaining economic and technological strength, which increases its international standing and leads to third countries becoming increasingly dependent on it economically and technologically.

Supported by onshoring, reindustrialisation, de-risking strategies and the diversification of sales markets – for example towards India, Indonesia and Africa – the EU has significantly increased its competitiveness. This allows it to successfully resist the economic pull of the United States. This position has also given the EU greater prestige in terms of its ideals: It is considered a safe harbour of intellectual freedom. Its autonomy and determination in defending liberal values strengthen its position against the MAGA-influenced United States and at the same time make it attractive to highly qualified skilled labour from China and other countries.

Measures to achieve the optimal position

A key factor for success is the development of coherent strategies that involve all member states. Minilateral arrangements and flexible groupings within the EU should be employed to ensure ad-hoc capacity to act even in the event of unexpected developments. To strengthen European autonomy, it is also necessary to establish self-sufficient defence capabilities. This allows the EU greater independence from the United States in terms of security policies but does not rule out (close) cooperation with the United States. The European pillar within NATO should be strengthened so that it can guarantee Europe's security and defence even without the United States' involvement. Beyond that, reciprocal analyses and mappings should be conducted at the EU level regarding third states for a better understanding of mutual dependencies in foreign trade relations and to derive targeted measures where necessary. Existing economic policy instruments should be systematically applied to ensure fair market opportunities for all member states on third markets.

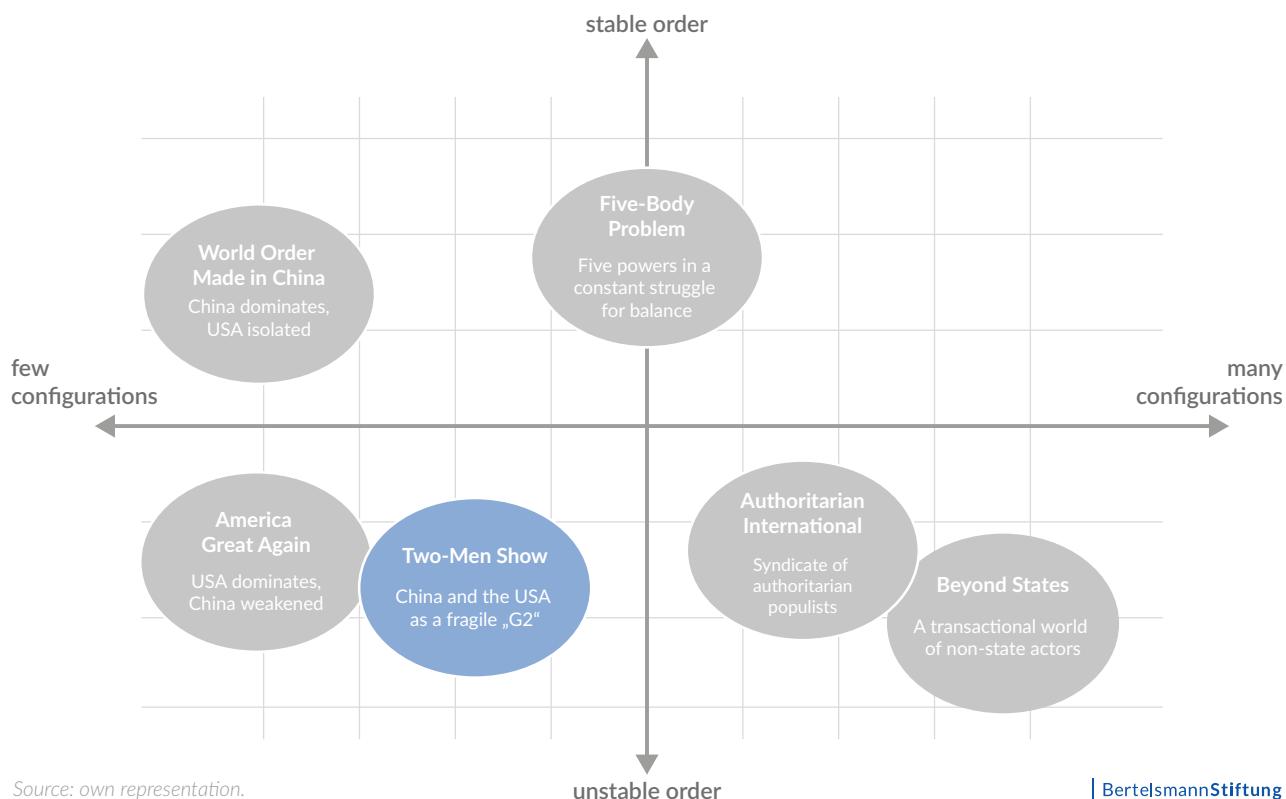
From a security and economic policy perspective, the “America Great Again” scenario calls for a massive and coordinated expansion of the European armaments industry, as independently of the United States as possible and in line with the agreed five percent target. Moreover, the EU should expand its space research in a targeted manner and invest in its own satellite infrastructure to ensure strategic autonomy and technological sovereignty.

At an economic level, critical sectors need to be identified and specifically promoted as part of systematic industrial policies. In this context, this scenario raises the question of which future core competences are essential for the implementation of the strategies and how these competences can be developed or purchased. The issue of skilled labour should be tightly integrated into European and national security policies. Simplified visa procedures or a European green card for urgently needed skilled labour are conceivable. At the same time, systematic security checks should be conducted when recruiting foreign skilled labour for security-related or technologically sensitive areas.



Scenario 3: Two-Men Show

China and the USA as a fragile “G2”



World News 2035

Taiwan Street is renamed Trump Street

World News 2035

Big double birthday party for Trump and Xi on 14 and 15 June

Situation in 2035

Global order

A G2 deal ensures a fragile, pragmatic coexistence. The United States and China regulate global power issues bilaterally; formal institutions play a secondary role.

 An escalating conflict between the United States and China led to the realisation that a direct clash would be devastating for both sides. As a result, a pragmatic coexistence was agreed upon – better a bipolar world order (“G2”) than mutual destruction. Since then, the two superpowers have largely accepted each other’s zones of influence – a fragile deal.

In this new system, states align themselves along the poles of power. Russia stands firmly by China’s side. Many democracies are forced to take a stand due to economic and security policy pressure. Europe is facing a crucial test. The stability of this order is fragile: The G2 deal is heavily dependent on very elderly actors whose personal interests characterise the balance – a change in the key actors could call everything into question. Taiwan is de facto assigned to China as part of the deal, while the United States insists on maintaining its chip supply in return – insofar as this is still necessary. This is because they have now replaced many of their supply streams from China.

In return, the United States forces the annexation of Greenland. In Latin America, Chinese influence is being partly reversed.

The de facto division of the global economy leads to permanent friction and efficiency losses. Rising costs and great uncertainty are the result. Socio-economic stress is growing. Inequalities are worsening. Authoritarian regimes suppress the resulting tensions. This new world order is based less on common rules than on control, mistrust and the logic of power – and can be shaken at the slightest impulse.

Deep cracks are appearing in the multilateral order: NATO has hardly any presence in Asia and is losing global relevance. Although it remains a potential instrument of the United States' influence, its credibility has been weakened. Washington wants to maintain a military presence in Southeast Asia – a move that provokes China. At the same time, China is expanding its influence through initiatives such as the Belt and Road Initiative (BRI), especially in regions where the United States is less active. Global institutions such as the UN continue to exist formally. However, instead of relying on international rules, the United States and China are increasingly relying on informal, bilateral and power-based agreements. While the United States tends to neglect multilateral institutions, China is trying to instrumentalise them – for example via the new RICS arrangement instead of the BRICS (Brazil, Russia, India, China, South Africa). As Brazil is part of the United States' sphere of influence, it is left out of the equation. Traditional organisations such as the IMF are also coming under pressure: The United States continues to dominate the management level, but China is gaining influence in the background. The formerly consensus-orientated G20 is developing into two informal camps that observe and confront each other.



Despite the deal, the United States and China remain strategic rivals with fundamentally conflicting interests. The pact is more of a temporary ceasefire than a viable solution: Many key issues remain unresolved or change so dynamically that constant renegotiations are necessary. Outer space also remains an area of conflict in which technological and military supremacy is contested. At the same time, the potential for escalation is growing due to states that want to evade the global “division”. The United States is still trying to curb China’s military growth. It remains unclear whether both sides are merely seeking a breathing space in the face of domestic political pressure – or whether they are prepared to openly settle the question of power. Mutual nuclear deterrence has a stabilising effect, but China’s rearmament ambitions are undermining trust. In resource-rich regions such as Africa, new proxy conflicts are emerging in which geopolitical rivalry is being played out under the guise of development aid or infrastructure projects.

Security and conflicts

The strategic rivalry between the G2 remains. A balance through nuclear deterrence prevents direct escalation, but proxy conflicts are on the rise.

Economy

Two largely separate technological and economic ecosystems with their own value chains are emerging. Global trade rules are becoming less important; power logic, technological sovereignty and supply capability dominate.



In the bipolar world order, two largely separate technological and economic ecosystems have emerged – including the accompanying loss of prosperity. The United States and China are establishing strategically controlled value chains and securing key sections of global production – from raw materials and technologies to manufacturing capacities. Despite efforts to achieve self-sufficiency, China remains heavily dependent on exports, which intensifies competition on third markets. Both sides are decoupling their economic cycles to reduce dependencies and create their own room for growth. The global trading system is changing into a results-orientated model: Rather than universal rules, it is now power politics, delivery capability and technological sovereignty that take precedence. In the Chinese-dominated region, the renminbi (RMB) is gaining ground as a reserve currency, which in turn further decouples the financial system. The digital sphere is becoming ever more isolated and is turning into a central arena for geopolitical rivalry.

Innovation and technology

Technological rivalry characterises the G2 order, with countries being pressurised to choose sides when it comes to supplying critical technologies. Export controls, espionage and isolationism are the norm.



Technological competition and strategic mistrust between the United States and China continue to characterise the relationship. Complete openness does not exist: Export controls – especially for key materials – serve as an instrument of geopolitical power. The United States is focussing on generative AI, while China uses AI primarily for industrial purposes. Similar differences can be seen in quantum technology: The United States is pushing ahead with quantum computing, while China is focussing on quantum networks for secure communication. Both strive for technological leadership, often through politically motivated, inefficient investments.

Competition is gradually spreading to the Global South and smaller states caught between the fronts. Countries such as the Netherlands and resource-rich states in the South become part of the power blocs. Third states try to supply both sides, but there is a de facto “neutrality ban” on critical technologies. Espionage is gaining considerable relevance, particularly in the high-tech sector. Innovations outside the two centres, for example in Europe, are becoming a geopolitical commodity: Niche developments could emerge there but would quickly be absorbed by the United States or China.

Environment and climate

China holds competitive advantages in green technology. The United States remains divided on domestic policy. Global climate policies are geopolitically charged.



The response to global disruptions such as climate change and environmental degradation highlights further differences. China occupies a strategically stronger position, as there is hardly any social conflict over environmental policies – in contrast to the politically polarised United States, which is also strongly affected by climate change, but cannot agree on a united climate policy internally and therefore does not take any targeted measures. Targeted investment in green technologies has also given China a clear competitive advantage, but it is itself facing massive ecological problems, such as increasing water scarcity. Overall, global value creation is shifting towards a fragmented system of competing blocs in which economic strength, geopolitical control and environmental policy are becoming increasingly intertwined.

Strategic implications for the EU

Risks

In this scenario, the main risks for the EU relate to geopolitical weakness, economic downturn and the rise of populist governments. The EU would be exposed to political blackmail by the United States and/or China and could be worn down between the power blocs. In a fragile equilibrium, Washington threatens to marginalise the EU in terms of foreign policy. At the same time, there would be a risk that Russia – backed by China – would expand its influence in Europe to destabilise the US bloc. Europe would run the risk of being caught between the fronts, regardless of its own interests.

Such a loss of relevance could have far-reaching consequences, such as the disintegration of NATO, and the failure of a pragmatic strategy of muddling through. Russia could influence the G2 to ensure that the EU must submit to a dictated peace without a say in the matter – a serious loss of independence and international influence.

The EU would also become economically vulnerable: The United States and/or China could cut it off from sensitive key technologies such as microchips at any time. This would fuel a deindustrialisation of the internal market – resulting in massive unemployment and dwindling political capacity to act. This development would further strengthen populist and authoritarian-nationalist forces and favour a move away from liberal, pro-European values. As a result, the Union could disintegrate, while its former member states pursue their foreign policy interests only individually and conclude their own agreements with the major powers.

Opportunities

However, the scenario also offers the EU the opportunity to assume a non-aligned role between two dominant power blocs. By pragmatically muddling through, it could navigate flexibly between the United States and China. As a neutral actor, the EU could trade with both sides and exploit new opportunities for partnerships with third states such as India.

While the EU's separation from the United States would require a reorientation, it would also increase its attractiveness as an independent partner of both blocs – especially for China. In the shadow of geopolitical rivalries, Europe could renegotiate fundamental issues: What does quality of life mean? How do we want to live together? What values do we want to represent? This self-reflection could initiate a partial withdrawal from the political world stage and promote alternative social models – similar to those in Portugal or Macedonia. This would allow the EU to profile itself as an even more attractive living environment and tourist destination, and to deepen alliances with like-minded states such as Japan, Canada and South Korea.

Simultaneously, technological progress would remain possible, for example in nanochip development or climate-neutral energies such as hydrogen from nuclear fusion. In certain sectors, the EU would even have the potential to become a technological leader, strengthening its competitiveness and attracting international corporations such as Amazon and Google. There would also be new sales opportunities for agricultural goods, as climatic challenges in China and the United States are restricting food production.

Optimal position

In this scenario, the EU will achieve its optimal position if it establishes itself as an independent third actor between the United States and China. This equidistance is challenging but ensures the EU's political survival in the long term. It protects it from being monopolised or geopolitically "sacrificed" by either side and, in the best-case scenario, can make it an indispensable partner for both power blocs.

In contrast to deliberate partisanship, the strategy of equidistance allows the EU to protect its own interests against both powers. The fragile balance of power remains stable due to mutual dependencies. Although these limit political solo efforts, they can be balanced within the framework of a balanced distance.

Measures to achieve the optimal position

To achieve the optimal position in this scenario, measures are required at political, economic and civil society level. It is crucial that the EU maintains its maximum strategic autonomy and does not align itself unequivocally with either of the two geopolitical camps. Such an independent position is the prerequisite for the EU to be able to protect and further develop its own values, models of life and political guidelines – even in a world order characterised by competition. Against this backdrop, one strategic approach could be to deliberately soften the confrontational yet tolerant coexistence between the United States and China. By breaking up the dynamics of this "two-men show", the EU could gain new room for manoeuvre from the resulting instability.

In the interests of reducing dependencies, the EU would have to be prepared to accept temporary inefficiencies and higher costs for the sake of strengthening its independence in the long term. The prerequisite for the ability to assume an equidistant intermediary position is the improvement of Europe's capacity to act – ideally by reforming EU governance, primarily by making greater use of flexible arrangements such as E3 or E5 groups, i.e. informal coalitions of several European states that coordinate their efforts to achieve common European and foreign policy objectives more efficiently. This model of differentiated integration could be supplemented by strategic alliances with third states such as Canada or India. At the same time, the EU should consolidate its internal coherence.

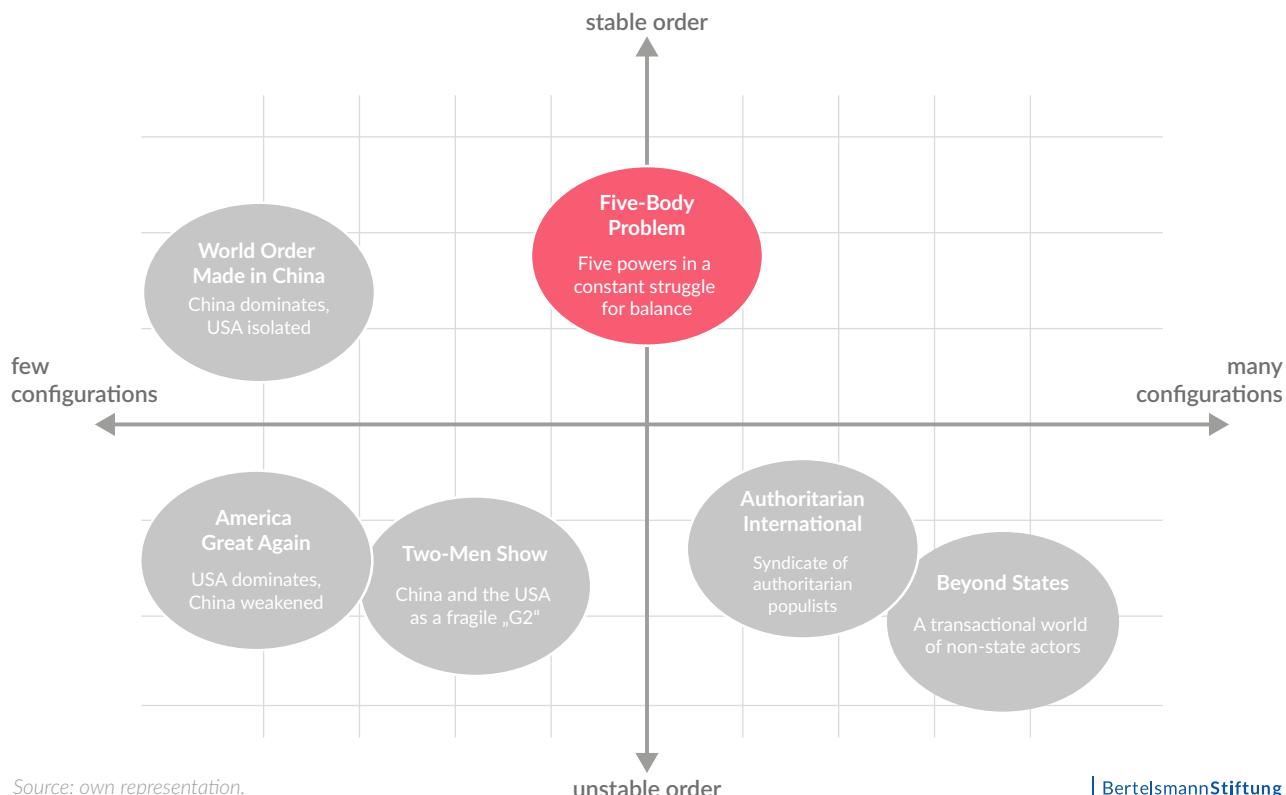
A new strategic culture is necessary: It should combine long-term goals with tactical flexibility, create fast decision-making mechanisms and establish independent security and fiscal policy instruments that do justice to geopolitical realities. Another prerequisite is the development of independent European defence capabilities.

At an economic level, it is important to strengthen the internal market in a targeted manner – by investing in existing core competences and developing new strategic skills. The aim would be to be perceived as a global negotiating partner on equal footing. The Japanese strategy of "strategic indispensability" provides guidance: With its unique competences, resources and technologies, the EU should play an indispensable role in the global system. In concrete terms, this means creating innovation-driven leading companies ("the next ASML") and offering European digital infrastructures specifically to those states that do not want to be part of a power bloc. In this way, Europe's strategic relevance could be sustainably expanded.



Scenario 4: Five-Body Problem

Five powers in a constant struggle for balance



Source: own representation.

| BertelsmannStiftung

World News 2035

World Security Council enforces nuclear arms limitation

World News 2035

World Security Council: Initiative against piracy launched

Situation in 2035

 The global order in this scenario is based on a balance between five powerful centres of gravity: the United States, China, Russia, India and the EU.³ In the face of global challenges such as climate change, all five powers have gathered allies around them – for example, the EU cooperates closely with the Middle East and North Africa (MENA) region. Each of these core powers is internally stable. Each has specific strengths that are respected by the others, so that none of them dominates. The five actors differ in terms of governance, legal framework and reserve currency. Values, culture and lifestyles are also developing in different directions. Together, the five powers govern the world order via a "World Security Council", the "W5", in which only they are represented. International organisations such as the UN have become meaningless. Only a few minimum rules apply in W5, such as a right of veto for each member. Conflicts are negotiated according to interests and power logic.

Global order

Five centres of power (EU, United States, China, India, Russia) keep the world order in balance. The W5 Council replaces traditional multilateral committees.

³ This scenario was inspired by the concept of "pentarchy" coined by the German political scientist Herfried Münkler in 2023 (see Münkler 2023). The title of the scenario is a tribute to the science-fiction trilogy *The Three-Body Problem* by Liu Cixin.

The balance is maintained as a result of constant negotiation, as each power sees an advantage in it for itself. At the same time, all five are waiting to see if another power seeks dominance or a permanent coalition of two, as this would immediately tip the balance of advantage. Targeted and systematic espionage between the five blocs is omnipresent. Shifting three-party coalitions based on specific interests maintain stability.

Security and conflicts

Military and nuclear armament ensure relative stability. Conflicts are strategically balanced by W5 deals.



All five powers are highly armed and nuclear-armed. The EU has its own defence structure with nuclear sharing, as France has spread its nuclear umbrella across Europe. Nevertheless, there is no extreme arms race, as all five powers share a common interest in preventing the proliferation of nuclear weapons in other states. The relative stability is seen as favourable.

In the contact zones between the centres of power, solutions are negotiated without regard for the wishes of the respective population. Occasionally, proxy wars flare up over the few remaining unattached states. Food security is central to all blocks. Rivalry is also focused on resources such as critical minerals, water and skilled labour. However, these tensions are repeatedly defused in the W5 Council through "barters". From time to time, the "W5 World Government" intervenes to contain global conflicts or overthrow unpopular governments, which has given the Council a certain legitimacy.

Economy

The five powers' striving for strategic autonomy characterises a fragmented global economy.



Global trade is severely restricted as all five players strive for strategic autonomy. Each of the five powers favours transactions in its own currency. Technological advantages and cutting-edge innovations are closely guarded. The value chains are largely located within one centre of power, even if the dependencies do not disappear completely. Many people try to get into blocks that fit their values and ideas about life. As a result, there is always migration between the blocks, but it is strictly regulated at W5 level.

Innovation and technology

Innovation is restricted to separate technospheres, characterised by mistrust and state control.



The five centres of power are developing in their own technospheres, which are growing further apart. The state plays a central steering role here. Mutual mistrust is high – when technological breakthroughs are achieved in other blocks, the fear of losing touch grows. Innovation is slow and often inefficient. Industrial espionage is omnipresent, while official communication on R&D topics across the five gravitational boundaries is minimal. The few unattached countries try to take advantage of the fragmentation but are constantly pressurised to join one of the technospheres.

Environment and climate

W5 recognises global warming as a common threat, but sustainable transformation remains elusive.



The rapid progression of global warming is recognised by the five powers to some extent as a common problem. China, India and the United States in particular are facing rapidly rising costs of the climate emergency – a reason to accept the stable W5 framework. W5 climate initiatives focus on large-scale technological approaches such as geoengineering. In the event of frequent extreme weather events, people support each other with emergency aid, but long-term sustainable transformation remains elusive.

Strategic implications for the EU

Risks

The greatest risks for the EU lie in its limited capacity to act, rising expenditure and increasingly uncontrolled immigration. This can result in greater economic and social vulnerability. Internal disagreements can make it difficult for the EU to present a coordinated and united front to the outside world. A hesitant, unconcerted stance towards the four other geopolitical alliances could in turn make the EU vulnerable and make it more difficult to assert itself against them.

The necessary investments in an independent, self-sufficient ecosystem and in an efficient defence and security infrastructure could cause considerable financial burdens. The resulting transformation costs could have a negative impact on social security, living standards and social cohesion. The expected high level of immigration into the EU poses another challenge – especially if cultural lines of conflict in the EU become even more entrenched as a result of the brain gain. This could result in an exodus of qualified skilled labour to Russia or China, for example to escape social or regulatory pressure. In addition, the compartmentalisation of value chains, innovation systems and research activities organised within the respective alliance makes it increasingly difficult to transfer technology beyond the coalition's borders, which could drive global fragmentation, particularly in the areas of technology and media.

Opportunities

In this scenario, opportunities for the EU arise particularly in the areas of innovation, bureaucracy reduction and – as a counterpart to the uncontrolled immigration mentioned among the risks – the recruitment of skilled labour. The constant observation by the four other geopolitical centres of gravity – the United States, China, Russia and India – could exert considerable external pressure on the EU, but this could strengthen the internal solidarity and unity within the Union and unleash innovation potential. Restricted global trade, which causes bottlenecks in raw materials, goods and services, could trigger innovation in various sectors. At the same time, the expansion of supranational defence and security structures brings with it new industries, job profiles and qualifications. The quest for more autonomy could lead to the creation of a largely independent ecosystem of its own within the EU. The resulting higher procurement and production costs could be countered by process automation. Technological progress could be achieved through targeted coalitions of convenience, e.g. in the field of green tech, or through cooperation with previously neutral states. The EU could also strengthen its relations with resource-rich countries – for example in Africa – to secure its strategic autonomy. As global institutions become less important, this could lead to a reduction in bureaucratic hurdles at institutional level. Despite this trend towards de-bureaucratisation, the EU could act as a role model due to its higher – and confidence-promoting – level of regulation in international comparison and thus develop a form of “soft power”, which could increase its global attractiveness and lead to an influx of qualified skilled labour.

Optimal position

The key to achieving the optimal position in this scenario is to strengthen the EU through reforms, extension and a high degree of political unity on all issues of geopolitical relevance. The EU is characterised by a high capacity for decision-making and action, comprehensive knowledge of the other four centres of power and non-aligned countries, fair burden-sharing among member states, high integrity, strong internal cohesion and extensive strategic autonomy. The latter is based on technological and economic sovereignty as well as on a credible capability for deterrence and defence capabilities that is both conventional and nuclear. As a result, the EU enjoys a high level of political legitimacy and a broad social acceptance. At the same time, it is regarded beyond its borders as a “bastion of values” to be taken seriously and as a power-political actor on an equal footing in geostrategic negotiations.

Measures to achieve the optimal position

Over the next ten years, the EU's capacity to act can be strengthened primarily through reforms within the existing treaty framework – for example, by making greater use of qualified majority voting and by expanding enhanced cooperation in key policy areas such as defence and raw materials policy. Moreover, targeted governance adjustments could be made to create more flexible forms of participation. In this way, a functional “multiple-tier system” is gradually emerging, i.e. an EU with different levels of integration in which not all member states have to cooperate to the same extent in all policy areas.

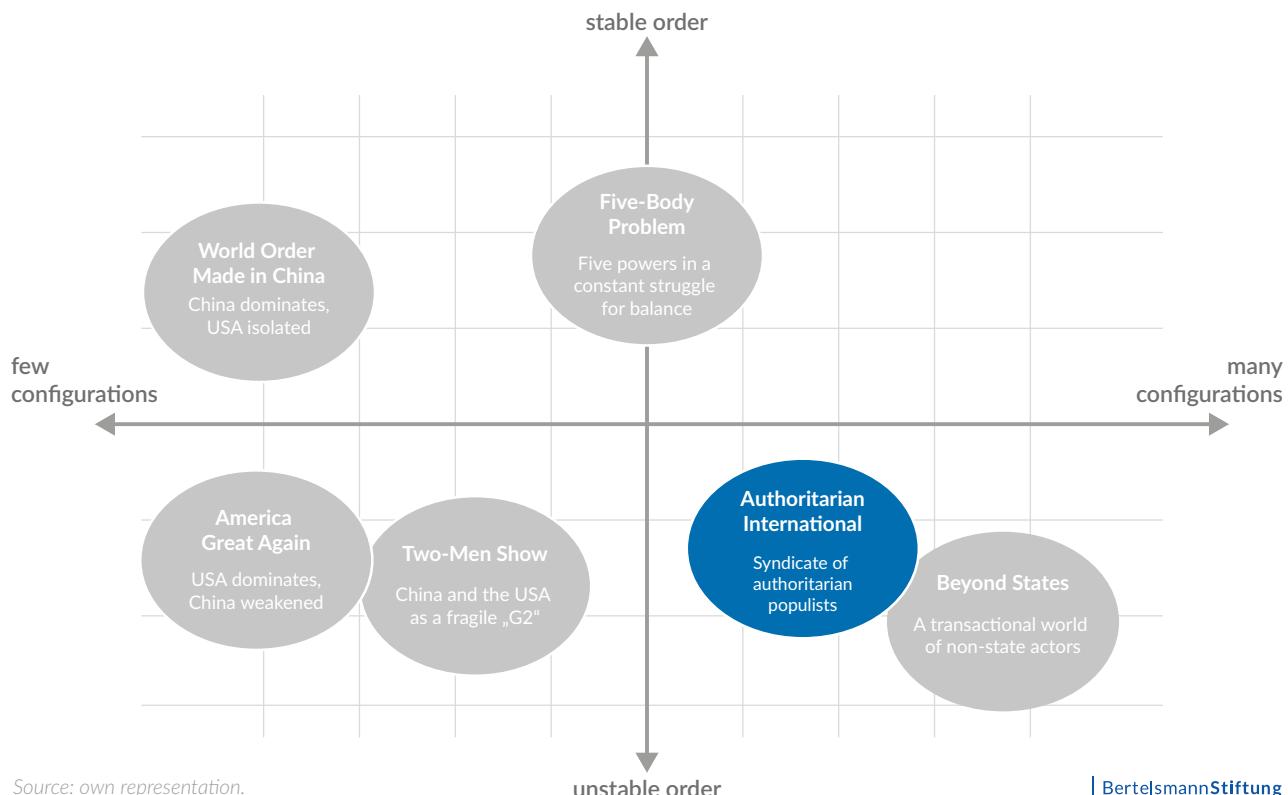
At an economic level, it is important to identify strategically relevant and sensitive sectors and to promote these in a targeted manner through investments and subsidies. The aim is to establish an autonomous industrial ecosystem in which research, development and education are systematically aligned along prioritised technologies and sectors. Public investment should prioritise the expansion of defence capabilities and the strengthening of intelligence services. Strategic partnerships could help to secure long-term access to critical raw materials. A strong commitment in regions rich in raw materials – particularly in Africa and Central Asia – and the targeted development of specific country expertise are key to this.

At the civil society level, it is crucial to develop a sound narrative that convincingly conveys the meaning and benefits of the necessary transformation efforts and also helps overcome phases of effort and hardship (“valley of tears”). It may also become necessary to abandon the previous universality of Eurocentric values and interpret them more flexibly in line with the respective strategic partnerships.



Scenario 5: Authoritarian International

Syndicate of authoritarian populists



World News 2035

The United States is abolishing its Ministry of Foreign Affairs

World News 2035

Cancelled: Amazon is withdrawing from liberal democracies

Situation in 2035



A global network of populist autocratic governments and illiberal democracies share dominance over the global order. Alongside China, Russia and the United States, numerous European states – including Hungary, France, Italy, Finland, the Netherlands and Spain – with right-wing governments are also part of this network. Although most autocrats pursue a basic nationalist orientation, the populist agenda of the “common people against the global elites” unites them in foreign policies. Together, they oppose the institutions of the old “liberal world order”, pluralism, equality, freedom, historical progress, the separation of powers and multicultural diversity. In many of these patrimonial regimes, the state is weakened by corrupt network structures and exploited for personal gain. Foreign policies are privatised and de-institutionalised, diplomatic structures have been replaced by loyalty networks. Other collaborations are ideological in nature and are geared towards the restoration of traditions, a community of shared values, a patriarchal model of lifestyle, civilisational renewal and the restoration of lost historical greatness. International relations are based on direct “leader to leader” contacts in which personal

Global order

A global alliance of authoritarian regimes is replacing the liberal order. Foreign policies are privatised, international institutions are losing importance.

sympathies or enmities set the tone. Negotiations take place behind closed doors and without minutes. The leaders portray themselves as superheroes and saviours of their people. Decisions are erratic, climate policies and development cooperation are suspended.

Security and conflicts

The authoritarian network employs subversive strategies against democracies, while conflicts over territory arise between autocracies.

 The autocratic network is pursuing an aggressive strategy of disintegration against the few remaining liberal democracies. This also includes hybrid attacks and sanctions and, in extreme cases, military means. But even among the strengthened autocracies, hostilities repeatedly arise due to competing territorial claims, for example in Poland. Outer space and “contact zones” where the authoritarian international meet are also affected.

Economy

Corruption and protectionism characterise the global economy. National production, fossil fuel sectors and hierarchical corporate management dominate.

 The global economy is highly characterised by corruption. The clans of the patrimonial states support each other in their business. The ideologically motivated members of the “Authoritarian International” prioritise trade and economic cooperation with states of a similar ideological orientation. At the same time, globalisation is being scaled back, national production is being promoted, and fossil fuel industries are experiencing a renaissance. The decarbonisation of the global economy has been halted, and environmental legislation is largely being abolished. Companies are increasingly organised hierarchically. Women are being pushed out of management positions and the labour market and are increasingly taking on traditional roles in the family. With immigration being strictly limited at the same time, this is leading to a massive shortage of skilled labour, which is being compensated for by AI-supported automation and longer working hours.

Innovation and technology

The focus is on key strategic technologies (AI, armaments, aerospace); renewable energies and environmental technology are in decline.

 In the “Authoritarian International”, the relationship to innovation is full of contradictions and tensions: On the one hand, traditionalists are pushing to focus innovation on established technologies and sectors. At the same time, developments in AI, chip technology, defence, advanced materials, robotics and aerospace are seen as the foundation of national strength and autonomy. The high pressure to automate also contributes to this. Renewable energies and environmental technology are being systematically cut back.

Environment and climate

The climate crisis is escalating, responses take the form of national adaptation and expensive climate engineering, while international cooperation remains elusive.

 The climate and environmental crisis has escalated dramatically: Extreme weather events are an everyday occurrence, with ever new cascading effects of biodiversity loss and environmental destruction. In response, technical climate engineering solutions and national adaptation strategies are being pursued, consuming ever larger shares of economic output.

Strategic implications for the EU

Risks

In this scenario, the EU faces considerable risks due to the possible disintegration of the Union, the loss of innovative strength, the collapse of global supply chains, as well as due to individual enrichment and the progressive decline of liberal values and social cohesion. Considering increasing nationalist and populist tendencies worldwide, the EU may find itself facing institutional disintegration, with international regulations and standards becoming obsolete. Key member states such as Germany or France could leave the EU, which would accelerate the disintegration of the eurozone and the dismantling of common standards and values.

In economic terms, there is a threat of regression and loss of innovation, the exodus of companies and skilled labour and, in the long term, the collapse of the pension system. Nationalistically motivated isolationism would fragment global supply and value chains, significantly impair their functionality and even bring globalisation to a standstill. Far-reaching deregulation would allow large corporations to maximise profits without regard for social costs – with growing oligopolisation and increasing acceptance of corruption as the norm. Social inequalities could increase significantly, which could lead to a loss of prosperity, social division and polarisation. This could result in riots and unrest. Minorities would be violently oppressed in the countries concerned, and defenceless and vulnerable groups could be systematically discriminated against and persecuted. Fundamental rights such as freedom of opinion and freedom of the press, as well as the protection of marginalised groups and nonconformists, could be increasingly restricted.

Accelerated global warming and progressive environmental degradation are leading to increasingly frequent extreme events that affect unprepared and less resilient societies. In the medium to long term, there is also a threat of military conflicts between nationally and imperialistically oriented actors.

Opportunities

The opportunities for the EU in this scenario are more a matter of damage control than genuine prospects. Individual EU states that are part of the authoritarian network could, for example, realise opportunity gains for themselves. For the remaining democratic member states, the preservation of liberal and constitutional principles could become a key differentiating factor. This could lead to the establishment of a “mini-EU” that is self-confidently committed to the defence and preservation of liberal, free and democratic values. This positioning could put the “mini-EU” in a favourable position in the international landscape. At the same time, there could be a political strengthening of progressive forces and the labour movement that oppose corrupt oligarchs and push for ambitious reforms of the social systems.

In the authoritarian parts, on the other hand, there could be economic advantages – at least in the short term: Turning away from climate targets, new raw material partnerships with Russia and China and the revitalisation of fossil fuel industries could improve the availability of raw materials and reduce prices in the short term. The armaments industry would also benefit from the tense security situation. Finally, it is conceivable that the authoritarian parts of the EU would move closer to Russia in terms of foreign policy to minimise risk, avoid security threats and thus – at least ostensibly – place themselves under a powerful protective umbrella. Ultimately, it is to be expected that sections of the population who favour authoritarian forms of government will welcome this development – especially in larger countries. Those countries would also try to dominate the smaller ones.

Optimal position

In this scenario, the EU is in an optimal position to limit damage if it continues to exist as a minimised EU at least. Despite having fewer member states, it still enjoys international support and backing through strategic coalitions with like-minded countries such as Australia and Canada. This global democratic village (“coalition of the willing”) allows the EU to retain its capacity to act despite downsizing.

The optimal position will also be achieved if, within this minimised EU, the separation of powers and free media remain in place, civil society remains stable, and key economic sectors and critical niche markets are secured. It is becoming evident that democratic institutions and processes significantly improve quality of life, that immigration is essential for society to function, and that resilience in terms of economy and security policies and technology offer the best protection against authoritarian influence – heralding a shift in migration policies.

Measures to achieve the optimal position

The development of efficient forms of governance is key, as is, if applicable, the targeted strengthening of bureaucratic structures to effectively safeguard constitutional institutions. Furthermore, unilateral cooperation arrangements should be expanded to retain capacity to act and exert targeted influence within the increasingly nationalistic power structures of authoritarian states.

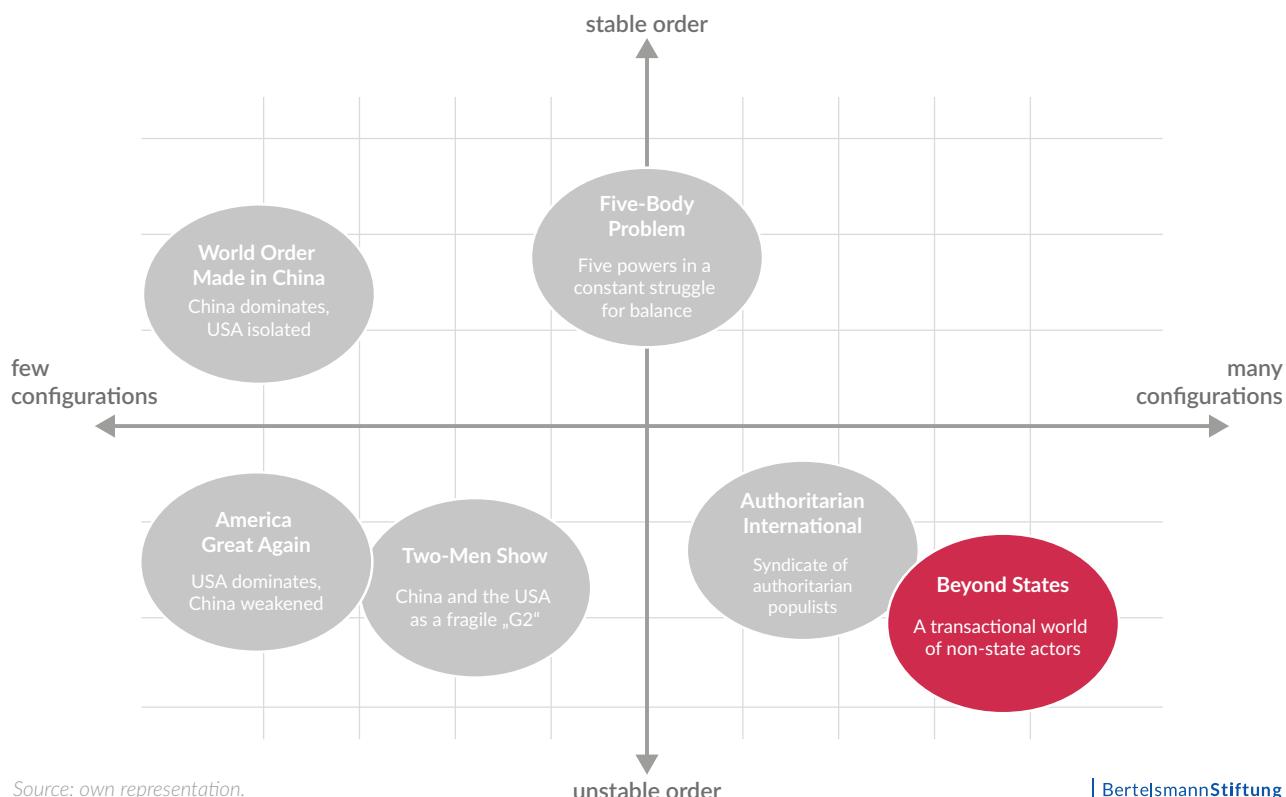
In terms of security policies, measures should be taken in this scenario to protect the populations of the “mini-EU” against hybrid and military threats from outside. Similarly, the consistent protection of sensitive data and of journalists and their increasingly endangered work is of central importance.

At the civil society level, measures to counteract growing disillusionment with politics should be given much greater importance and implemented consistently. One approach would be to curb elite and clan structures in favour of direct exchange arrangements between citizens (people-to-people exchanges), in which shared values are strengthened. In addition, civil society structures outside the EU – especially in partner countries with similar democratic objectives – should be specifically promoted and stabilised in the long term.



Scenario 6: Beyond States

A transactional world of non-state actors



Source: own representation.

| Bertelsmann Stiftung

World News 2035

US governor concludes agreement with trafficking ring

World News 2035

Bitcoin trading volume exceeds pound sterling for the first time

Situation in 2035

 In this scenario, non-state actors have gained considerable power. At the same time, states still play an important role, but they have largely lost their monopoly on the use of force and their normative authority. Societies are becoming increasingly fragmented. Influential oligarchs, multinational corporations and cartels assert their interests across state borders. Parties, associations, sects, social movements, NGOs and city networks also try to promote the particular interests of their members – albeit to a more limited extent. Violence as a means of power is even exerted in public. Sometimes states join forces with non-state actors, sometimes non-state actors take over state tasks. However, this does not result in any firm alliances. Global governance is in a constant state of flux. The international organisations and the rules-based world order of the 20th century are effectively obsolete.

Global order

Non-state actors – corporations, cartels, NGOs – predominate; states are losing control. Global fragmentation replaces multilateral order.

Security and conflicts

Mercenary armies, private security services and hybrid conflicts dominate the landscape.



Non-state actors operate across territories and secure access to resources, markets and industrial facilities. As states no longer have the capacity to wage war, conflicts are being waged by mercenary troops. States can only negotiate reactively.

Economy

The global economy is unstable; only a few actors manage to establish secure centres. Education, infrastructure and security are largely privatised.



Cartels and companies are taking on more and more state functions: Education, the military and climate adaptation are largely privatised. However, only a few actors manage to establish themselves permanently in one place. Much of the world is experiencing high levels of economic uncertainty. Global trade has collapsed; alternative currencies and bartering have become commonplace. Only a few state and non-state actors succeed in establishing stable centres that provide security for economic activity. In a world of chaos, security has become the most important locational advantage. Rules, standards and regulations are not set by states, or only partially so, but are constantly renegotiated via arbitration tribunals and ad-hoc agreements. The economic gap between the productive centres and the impoverished periphery is constantly widening. Social inequality, the loss of labour and fundamental rights, and emerging resistance characterise everyday life.

Innovation and technology

Access to technology is unevenly distributed; technology serves social control and remains the preserve of a few actors.



Despite the growing need for innovation, global uncertainties are preventing investment and technological development is stagnating. Only a few powerful players have access to technologies, infrastructures and resources – often with difficulties in securing this access. Existing technologies, particularly in the sector of digital and AI, are being repurposed for social control.

Environment and climate

The climate crisis is worsening. Regions with stable climates are highly contested and attract investments.



The climate crisis is progressing rapidly, which means that areas with a stable climate, mild temperatures and sufficient rainfall are highly contested. In some cases, these regions can establish themselves as safe centres and attract enormous investments, which then flow primarily into climate adaptation. Accordingly, environmental degradation is intensifying in other regions, and more and more areas are being abandoned as uninhabitable.

Strategic implications for the EU

Risks

In this scenario, the main risks for the EU arise from regulatory incompatibilities, limited state capacity to act, international decision-making processes and a possible erosion of values. The regulatory framework that characterises the EU could prove to be a power-political disadvantage in a fluid global governance structure. As the EU and its member states are increasingly dependent on the benevolence and willingness to cooperate of non-state and private actors in international decision-making processes, there is a risk of a considerable loss of state sovereignty and vertical capacity to act. Territorial disintegration, unclear ownership structures that contribute to non-transparent decision-making processes, private and particular interests could thus increasingly undermine democratic structures – a process known as state capture. At the same time, the growing number of state and non-state actors at international level makes it difficult for the EU to adopt a coordinated foreign policy position and limits its horizontal capacity to act. Tendencies towards illiberalisation may intensify, which could increase the social acceptance of manipulation and corruption. The centralisation of economic power in the hands of a few tech companies – “Silicon Valleyisation” – and the emergence of economic monopolies of power could further exacerbate such internal tensions.

Opportunities

Even if there are hardly any real opportunities for the EU in this scenario, an alternative development path was discussed. In this context, its federal, decentralised and subsidiary system and its economic heterogeneity could become key factors for resilience, stability and social justice. However, a certain amount of support from non-state actors who are sympathetic to the EU is a prerequisite for this. The federal structure of the EU favours the emergence of cooperativism, which promotes participatory political decision-making processes instead of decisions being made in isolated monopolies and centres of power. This would allow the EU to distance itself from an increasingly non-rules-based world order and consciously involve a wide range of social actors – such as associations, individuals, NGOs, companies and social movements – in debates about the future. There would also be opportunities for monetary policies: In view of a weakening US dollar, national European currencies and cryptocurrencies could gain in importance.

Optimal position

The optimal position of the EU in this scenario is that of an “island of functioning (constitutional) statehood”. It is based on an agile grassroots democracy that is committed to building a new rules-based regulatory framework. It can be assumed that the rampant territorial disintegration will also be accompanied by the exit of member states, leaving behind a diminished EU. At the same time, large non-state actors are still present in Europe: They act and operate globally but see themselves explicitly as supporters and promoters of the EU.

A functional, largely self-sufficient industrial-technological ecosystem has also been established regarding the European single market. This integrated, uniform market has given the EU new relevance. It is perceived internationally as a serious negotiating partner and can exert a targeted influence on global monopolies by specialising in niche technologies. The European single market is characterised by a powerful and de-bureaucratised innovation system that cooperates closely with science and regularly produces world market leaders through targeted concentration and consolidation processes (“We are more than SAP and ASML”). Data protection remains consistently safeguarded. This unique combination – economic strength, innovative power and rule of law – makes the EU attractive to third states and highly qualified skilled labour.

Measures to achieve the optimal position

To achieve the optimal position of a European island of strong, functional (constitutional) statehood, political and economic measures were identified in this scenario. The focus is on the systematic reduction of bureaucracy as part of a comprehensive state reform with two main objectives: Firstly, the consistent implementation of the principle of subsidiarity at as many levels as possible, and secondly, the reduction of documentation requirements, particularly in administration and education. At the same time, existing regulations such as the Digital Services Act (DSA) should be implemented effectively to strengthen the performance of European institutions and the public's trust in them.

Since such a reform requires strategic foresight and political continuity beyond legislative periods, legally enshrined campaign-free periods for politicians prior to elections could help to promote long-term planning and proactive decisions. It is equally important to have the courage to take unpopular measures that meet with social or media resistance. Just as crucial for engaging key actors is defending liberal values and offering compelling narratives about the future: The “best story” can determine the allocation of attention and resources and contribute to system stabilisation. Finally, the development of a new political narrative that promotes social cohesion and collective responsibility – without claiming to provide perfect solutions for all problems (perfect is the enemy of the good) – has a supporting effect.

Effective problem solving in the “Beyond States” scenario also requires strong informal coordination – especially between European governments and technology companies, which cooperate for pragmatic reasons and make targeted use of existing instruments of power. Furthermore, entrepreneurial cooperation models could be established, such as “Hanseatic models,” which are built around capable entrepreneurs and effectively counteract structural mafia tendencies. At the same time, protest movements and collective bargaining – for example in the form of works councils or trade unions – play a central role. They promote the further development of grassroots democratic rights and further integrate social interests into political decision-making processes.

Finally, at an economic level, small and medium-sized enterprises (SMEs) should be specifically promoted in this scenario, for example through the expansion and diversification of SMEs and the creation of efficient network structures to strengthen resilience and competitiveness against global “tech titans”.

Consistent, collective and immediate action is necessary – for an optimal position of the EU in the world (dis)order of 2035

The six scenarios open up new avenues of thought and action for decision-makers in politics, business and civil society regarding the long-term development of the global order. They are not forecasts but show a variety of possible future paths up to the year 2035. They emphasise the need to engage intensively with the future and the changes in the global order.

In addition to scenario-specific ones, “robust” fields of action can be derived from these scenarios, i.e. those fields of action that occur in as many of the six scenarios as possible. Such fields of action applicable to all scenarios are robust, as they are not tied to a specific vision of the future.

They help mitigate risks in a variety of possible outcomes while also taking full advantage of opportunities amid uncertainty. Implementing the robust fields of action could therefore put the EU in an optimal position in 2035, regardless of the scenario. There are four robust fields of action:

- the political-institutional,
- the security policy,
- the economic-technological, and
- the civil-society field of action.

Consistent action is necessary – to prepare for different scenarios

All robust fields of action are aimed at strengthening Europe’s resilience. Given the sharp increase in volatility in the environment, it has become more important to focus on maintaining the ability to act and react than to prepare for specific conceivable configurations. On the one hand, this seems frustrating because many of the fields of action relate to well-known, neglected “homework”. On the other hand, it is encouraging that consistently tackling this “homework” can strengthen the EU regarding a variety of possible geopolitical developments.

At the **political-institutional level**, all scenarios emphasise the need for the EU to improve its decision-making and thus its capacity to act. The ideal solution would be comprehensive governance reform through an amendment to the European treaties, but this is hardly realistic in political terms. However, progress can also be achieved within the framework of existing treaties through various means of differentiated integration. This includes i.a. making greater use of qualified majority voting and improving closer cooperation in key policy areas such as defence and raw materials policies. The acceptance and effective implementation of minilateral arrangements – i.e. smaller coalitions of member states following the principle of a “multiple-tier system” – are also of central importance to avoid decision-making deadlocks and to ensure flexible responsiveness to unexpected events. To ensure that situational actions of this kind do not lead to disparate, arbitrary or even opportunistic decisions, a collectively recognised set of values is needed as guidance framework. In addition, mechanisms should be created that allow both the exclusion of member states that permanently refuse deeper integration, as well as later

readmission. Strategic alliances with non-EU countries are also needed to ensure and expand the EU's international capacity to act and its relevance in the long term. This applies to like-minded countries in the political West, such as the UK, Canada, Japan and Australia, but also to important actors in the Global South, such as Brazil, India, South Africa and the ASEAN states.

At **security policy level**, the EU's defence capabilities should be strengthened through targeted investment in the development and expansion of joint structures, processes and resources as well as better interlinked foreign and security policies. Key elements are deeper integration of national armed forces, close European armaments and innovation cooperation with harmonised standards, strengthened intelligence services and shared situation analysis. Increased defence investment would significantly strengthen Europe's ability to provide conventional deterrence. They would also create better conditions for nuclear deterrence, although its credibility and further development remain dependent to a much greater extent on political and practical conditions that go beyond purely financial efforts. Coordinated interaction with NATO remains crucial. A credible European security architecture is based not only on convincing capabilities for deterrence, but also on a deeper understanding of other regions of the world, their political systems, institutions, cultural characteristics, and social discourses and narratives. This is an important prerequisite for targeted action tailored to specific countries or regions.

At the **economic and technological level**, the rapid identification and systematic prioritisation of critical key industries, markets and technologies is crucial to ensure the EU's strategic capacity to act. The concept of "strategic indispensability" is particularly relevant in this context: The aim is to stabilise and secure the EU's strategic position in the long term through the targeted development of third-party dependencies on European strengths and expertise. At the same time, strategic options should remain flexible, while consistently monitoring market developments and encouraging a culture of risk-taking. Positioning in market and technology niches is just as crucial. The systematic development of comprehensive technological ecosystems would also help achieve technological leadership or at least sovereignty in certain sectors. This is closely linked to the recruitment, promotion and long-term retention of highly specialised skilled labour. Finally, extensive streamlining of regulations – ideally without compromising European sustainability ambitions – could reduce excessive control mechanisms, create more agility, strengthen trust and open up better access to financing opportunities for talent.

At **civil society level**, credible, inspiring and compatible narratives and visions of the future need to be developed that take into account what constitutes a good life. This also includes clearly identifying the challenges and costs that will be incurred along the way. The combination of an attractive vision for the future and transparent communication can help to create understanding and acceptance for the burdens of reform and transformation (for example in a transitional phase, a "valley of tears"), and facilitate tolerance for temporary inefficiencies and promote collective efforts to work towards a long-term goal. At the same time, this can go hand in hand with the reinforcing of a shared value base, as appears necessary in some scenarios.

Collective action is necessary – to achieve full impact

Some of the robust fields of action only develop their full impact when several actors act in concert. This is the case, for example, with the development of a "tech ecosystem" and the strengthening of "strategic indispensability", in which politics and business should cooperate, but society is also called upon. For example, new solutions with less dependence on central players may require new forms of use and behaviour.

The same applies to strategic capability and defence capabilities: Social resilience is just as crucial as military strength, political determination and a strong industrial base. The ability to defend against hybrid threats can be just as relevant as long-term planning and the provision of military equipment.

A key role is played by education in all its forms: It allows for the absorption of labour market shifts resulting from new political and technological priorities, the development of new skills for emerging market niches, and the establishment of sustainable alliances through intercultural knowledge.

Another example is the expansion of knowledge about other regions of the world – a task that affects all levels of society: From strengthening diplomatic and intelligence capabilities through politics, to the targeted initiation of economic cooperation, to the learning of foreign languages and cultures in schools. In all these cases, the greatest added value is not created by isolated measures, but by the interaction and coordination of the individual contributions. This is particularly evident in the strengthening of shared values and inspiring visions for the future: They will only be fully effective if they include diverse perspectives and are shared across social groups.

Consistently implementing the robust fields of action is very likely to pay off for Europe and is therefore recommended in any case.

Furthermore, political and economic actors, in particular those who make large investments based on certain geopolitical assumptions, should also consider fields of action that are only relevant for individual scenarios but could help to mitigate high risks. These could be fields of action that address a possible failure of China – as described in the “America Great Again” scenario. Such “contingency strategies” are context-dependent and should be developed individually by the respective actor. However, they should be included in the use of the scenarios.

Immediate action is necessary – to ensure capacity to act in 2035

The international power configuration that the EU will face in 2035 is not foreseeable. The robust fields of action outline critical strategic decisions so that the EU can position itself as optimally as possible in the world (dis)order that will exist in 2035, regardless of the scenario.

The fields of action are not unknown and have been on the table for some time. However, the scenarios once again demonstrate how urgent the need for action is and show that inaction will have consequences.

The scenarios also make clear that only a strong, united EU with global appeal (economically as well as politically and socially) can assert itself in a changing world order and be a viable geopolitical actor by 2035. Achieving this requires immediate action.

Appendix: Approach and methodology

Initially, a classic “morphological” approach was planned for the scenario process. In the first step of the “system analysis”, factors influencing the system under consideration are collected and those with high relevance and great uncertainty chosen. Possible future developments are then worked out for these “key factors” and compiled into plausible scenarios by means of a consistency analysis (see, for example, MERICS 2023). Initially, the same approach was taken here.

As part of this approach, developments in society, technology, the economy, the environment, politics and legislation that are mentioned in the context of changes in the global world order were compiled using a STEEPL approach commonly used in futurology. For each of these aspects, different, often quite contradictory “voices” were collected that point to changes in the global world order.

The results of this first system analysis are listed in the following table:

Table A1: Voices from academia, media, think tanks and foresight on factors influencing global order

Influencing factor	Aspects
Type of partnerships: Consistency, size, exclusivity, number	<ul style="list-style-type: none"> • Bipolarisation (CN/RU vs. US/West); emphasis on strategic autonomy; systemic conflict (Goldthau et al. 2019) • More and more small alliances (minilateralism), more and more countries “multi-aligned” (UNICEF 2024) • Increasing number of potential centres: “By 2040, states such as Egypt, Brazil, India, Indonesia, Iran, Kenya, Mexico, Nigeria, the Philippines, Turkey and Vietnam could reveal themselves even more clearly as not only regional but also global centres of power.” (ESPAS 2024) • 100+ neutral countries; transactional 25 represent 45% of the world population and 18% GDP, these countries take increasingly pragmatic transactional approach (The Economist 2023) • Increasing economic and political importance of non-aligned connector countries (Baracuhy 2024; Gopinath et al. 2025) • Trend towards the informal institutions G+ and BRICS (Papa et al. 2023) • Alliances in constant flux as potential disruption (Policy Horizons Canada 2024)

China-Russia relationship	<ul style="list-style-type: none"> Strategic partnership, but so far no formal military alliance; continuous rapprochement at all levels; increasing dominance of China (Gabujew 2024; Menzel 2023, 2025) <p>Additional aspect</p> <ul style="list-style-type: none"> Restraint from China due to fear of entrapment (Odgaard 2023)
US alliance: general behaviour	<ul style="list-style-type: none"> Uncertain due to Trump 2.0 (The Economist 2025e; Wertheim 2025) Alliance network built up over decades with huge influence on the world could be destroyed (Cooley et al. 2025a, 2025b) Possibly abandonment of the primacy claim, but primacy can also go hand in hand with multipolarity (Wertheim 2025) Global South interprets Trump policy as a new endeavour for primacy rather than isolationism (Spektor 2025) Replacement of expert civil servants and politicisation of bureaucracy by Trump makes it difficult to build long-term alliances (Bohrn et al. 2024) Worldwide coalitions with illiberal, autocratic and far-right actors are conceivable (Bohrn et al. 2024; Menzel 2023, 2025)
USA-China relationship	<ul style="list-style-type: none"> Trump could pursue a deal with China (G2), e.g. Taiwan position against restrictions on exports to the United States (The Economist 2025a) Partial ideological similarities between Trump and Xi (anti-woke) (The Economist 2024c)
USA-Russia relationship	<ul style="list-style-type: none"> Tense, i.a. regarding Ukraine, but open for “deals” under Trump (The Economist 2025g)
USA-Asia-Pacific alliances	<ul style="list-style-type: none"> Network of mutual support is fragile, also depends on Taiwan (Atanassova-Cornelis et al. 2024; The Economist 2025d)
USA-Europe-/transatlantic relationship, NATO	<ul style="list-style-type: none"> Uncertain due to Trump (The Economist 2024b, 2024d, 2025e) Leaving NATO would greatly weaken the United States geopolitically; the United States could withdraw and further enlargements could follow the current one (Cooley et al. 2025a)

China alliances	<ul style="list-style-type: none"> • China's goal: Leading world power 2049, preference for South-South Cooperation (Bartsch et al. 2020) • Advancing alternative global governance structures: Shanghai Cooperation Organisation (SCO), Global Security Initiative (Cooley et al. 2025a) • 52 states bordering the BRI tend to form alliances with China; success of Chinese efforts to form alternative alliances also in the EU neighbourhood, Iran and Turkey as well as the EU itself (e.g. Greece [Bartsch et al. 2020]) • Weakness due to inner conflicts (Goldthau et al. 2019) • China currently still weak as a mediator (Kimmage et al. 2023)
EU unity	<ul style="list-style-type: none"> • Risk of weakening due to internal conflicts (European Commission 2024) or external factors (Vesnic-Alujevic et al. 2023) • Increasing Russian and Chinese influence within the EU and the immediate neighbourhood (Bartsch et al. 2020; Bauer et al. 2018), resulting in increasing conflicts
India alliances	<ul style="list-style-type: none"> • Striving for independence; closer ties to Russia despite United States' efforts, but good relationship between Trump and Modi; quad alliance against China; doubts about the quality of Russian weapons (The Economist 2025h)
BRICS+: development, alignment	<ul style="list-style-type: none"> • BRICS is growing in systemic relevance and negotiating power (41% world population, 31.5 GDP, 16% global trade, flagship New Development Bank [NDB]) (Papa et al. 2023) • Different assessments as to whether BRICS is a counterweight to hegemony; growing convergence of policies across broad policy areas; growing convergence in times of conflict with the United States (<i>ibid.</i>) • Growing number of members; conflicts within the group; scepticism towards the "West" (Haryono 2024; UNICEF 2024) • BRICS could try to turn against the dollar (Spektor 2025)

Type of economic interdependencies	<ul style="list-style-type: none"> Protectionism is on the rise: Concentration, friendshoring, transactionalism, economic fragmentation, tariffs, containment (Aiyar et al. 2024; European Commission 2024; The Economist 2025f; UNICEF 2024) Geographical distance of trade is still increasing (globalisation, nearshoring not visible), but geopolitical distance is decreasing (friendshoring) (The Economist 2025f) Decoupling is empirically visible, but only to a small extent; the reason for this is re-routing via connector countries, which would be limited in the case of hard block formation (Goldthau et al. 2019; Gopinath et al. 2025) Economic success increasingly dependent on political/military alliances (Jackson et al. 2024)
China: Belt and Road Initiative	<ul style="list-style-type: none"> Prevalence in Africa and South America as well as in former Soviet republics (Menzel 2025) Growing economic integration between China and EU neighbourhood (Bertelsmann Stiftung et al. 2023) Economic integration projects OTS, EU, Global Gateway; connectivity endeavours Western efforts to establish BRI-like structures are difficult because powerful social forces do not support them in the same way as in China in terms of actors, capital and means of production (Hameiri et al. 2024)
Trade patterns / agreements	<ul style="list-style-type: none"> Global Economic Decoupling of United States and China (Bertelsmann Stiftung et al. 2023) Drastic increase in trade with Russia and China (Menzel 2025) EU has closest agreements with neighbours of all actors (Bertelsmann Stiftung et al. 2023)
Currency dynamics	<ul style="list-style-type: none"> De-dollarisation conceivable (ESPAS 2024) More yuan are traded through Russia (Menzel 2023) Dollar and euro are most important currencies in EU neighbourhood (Bertelsmann Stiftung et al. 2023)

Economic growth: Where? Distributed how? How stable?	<ul style="list-style-type: none"> Income inequality between countries remains high (European Commission 2024) US economy faces slowdown. The International Monetary Fund (IMF) has lowered its growth forecast to 1.8%. Tariffs could fuel inflation; deficit significantly increased. For the first time in over 100 years, US government bonds are no longer rated triple A. (International Monetary Fund 2025; The Economist 2025b; WEF 2024) China's export strategy (Made in China 2025) is extremely successful, but also has negative repercussions for the economy (The Economist 2025c); consequences for unemployment in other regions ("China Shock") (Autor et al. 2021) Russia has lost its importance as an export destination (but often diverted via Belarus) (Bertelsmann Stiftung et al. 2023) Russian pension-based economy severely weakened (Menzel 2025) Lack of investment in development in poor countries (WEF 2024); ever decreasing humanitarian aid while needs increase (UNICEF 2024) Influence of criminal actors grows (WEF 2024)
Condition of international institutions, UN, WHO etc. / new structures	<ul style="list-style-type: none"> Delegitimisation of global governance institutions due to serious institutional deficits, fragmentation and dissolution, but also their renewal and reinforcement with a reduced role for nation states, e.g. "cosmopolitan pluralism" is conceivable (Zürn 2018) Delegitimisation of global institutions by various actors (including non-populists) acting in their own interests (van der Veer et al. 2024) UN's agency decreasing (European Commission 2024; Singh et al. 2022); attacks by Russia backed by China (The Economist 2024a) as well as BRI countries and Trump Long undermined by the United States, Washington has failed to ratify more than 50 treaties (Castañeda 2025) China operates alternative systems of its own, e.g. Shanghai Cooperation Organisation (SCO), Global Security Initiative (GSI). As representatives of "the West," the IMF and World Bank therefore support multilateral development banks such as the Asian Infrastructure Investment Bank (AIIB) and the Asian Development Bank (ADB) (Bartsch et al. 2020; MERICS 2023; Singh et al. 2022) <ul style="list-style-type: none"> → illiberal & multilateral are well compatible (Cooley et al. 2025a, 2025b)

	<ul style="list-style-type: none"> • China would like to introduce new institutions under Chinese leadership “with Chinese characteristics” (Beijing Consensus) (Alter et al. 2024), but resistance from Western states makes this difficult to implement. Further increase in cooperation patterns outside the UN are likely (<i>ibid.</i>). • Different perceptions of the ideal situation among Chinese scholars (Xiong et al. 2024) • Increase in minilateral agreements (ESPAS 2024; UNICEF 2024) • Institutional reform takes place even without shock and systemic change through bureaucrats (Carnegie et al. 2023) • Increasing influence of private actors such as the Gates Foundation (Singh et al. 2022) • Growing calls to create more room for voices from civil society (Singh et al. 2022) • Russia favours decision by fewer major powers (Bauer et al. 2018) • Without a guardian, it is necessary to limit the global validity of Western values and norms. Priority either to assert values without consequences or to agree on binding rules. The best configuration would be Pentarchy. (United States, China, Russia, EU, India) (Münkler 2023) • Conceivable development: The Global South convinces the United States to resume compliance with the global order and thus undermine China. (Castañeda 2025)
Innovation leadership in key technologies	<ul style="list-style-type: none"> • China is leading in more and more sectors, most recently in AI, despite sanctions (The Economist 2025i) • Convergence of technological development and geopolitical dynamics creates new winners and losers (WEF 2024)
Raw material partnerships/competitions	<ul style="list-style-type: none"> • Struggle for basic raw materials (water, food); shortages pose fourth biggest risk in the next ten years (WEF 2024) • In the long term, fossil fuel alliances may dissolve, oil-producing countries lose influence and importers gain ground (Goldthau et al. 2019) • New competition due to demand for new technologies; shift to synthetic food (European Commission 2024)

Allied behaviour in Global South	<ul style="list-style-type: none"> Success of Russia's efforts for the Global South (ESPAS 2024) Increasingly hostile to alliances with "colonial powers" (Goldthau et al. 2019) Dissatisfaction with global order and willingness to reform often unintentionally serve China's interests (Castañeda 2025) Growing dissatisfaction with China turning from partner to hegemon (Spektor 2025)
Nature, frequency and intensity of global conflicts	<ul style="list-style-type: none"> Rising military expenditure (ESPAS 2024; Obermeier et al. 2023) Distraction of major powers increases aggression and risk appetite of other actors (Kimmage et al. 2023) Conflicts over new spaces (poles, high seas, outer space) (European Commission 2024) Growing refugee movements i.a. due to climate change; 216 million refugees expected by 2050 (ESPAS 2024) Private actors increasingly involved in conflicts (UNICEF 2024); these question the rules-based world order, while government conflicts are on the rise (Obermeier et al. 2023) Environmental destruction and climate change are driving forces behind many conflicts (ESPAS 2024; European Commission 2024; UNICEF 2024) Polarisation and disinformation could lead to an increase in terrorism; blurring of boundaries between state armies, militias and terrorist groups (WEF 2024)
Number of democracies vs. autocracies, stability and depth of democracies	<ul style="list-style-type: none"> Democracy weakened worldwide (ESPAS 2024; IDEA 2023) United States could develop into an illiberal democracy (Bohrn et al. 2024) Thesis: An authoritarian century under the leadership of China could be imminent (Menzel 2023) Takeover of state functions by private actors; increasing influence of powerful individuals; "Billionaires run the world" potentially disruptive (Policy Horizons Canada 2024) Global crime growing in influence (WEF 2024)

Degree of misinformation and disinformation worldwide	<ul style="list-style-type: none"> Misinformation and disinformation as well as social polarisation greatest risk for the next two years, fifth place for the next ten years (WEF 2024) Increase in niche thinking (European Commission 2024) Global “battle of narratives” democracy vs. autocracy, West vs. Rest etc.; polarisation of debates (e.g. on gender); increase in manipulation through technology, social media (UNICEF 2024; WEF 2024)
Artificial intelligence: Dominance, players, commodities, regulation, fragmentation, cyber security	<ul style="list-style-type: none"> Damage caused by the use of AI sixth-greatest risk over the next ten years (WEF 2024) Competition for AI dominance as a geopolitical factor (ESPAS 2024; OECD 2025; WEF 2024) Cyber insecurity fourth-highest risk in the next two years and eighth-greatest in the next ten years (WEF 2024) Disruptions possible due to cyberattacks on critical infrastructure (Policy Horizons Canada 2024)
Demographic change	<ul style="list-style-type: none"> Population in most countries is ageing; slowdown in population growth; Africa's share in the global population and youth in particular is growing (European Commission 2024); demographic bifurcation (WEF 2024)
Environmental degradation and climate change	<ul style="list-style-type: none"> Environmental degradation and climate change among top four risks for the next ten years (WEF 2024)

As the list shows, this approach resulted in many overlaps and dependencies. The relationship between the United States and China, for example, can hardly be considered separately from that between China and Russia, and economic conditions are also closely linked to military and political orders. In addition, almost all topics refer to the global balance of power as a driver of the various developments.

Therefore, a deductive approach proved suitable for this question, in which scenario development is based on a few dominant factors rather than a multitude of different ones, with further aspects only being incorporated afterwards (Ringland 1998; van der Heijden 1997). Two criteria are decisive in identifying the “main axes” of the scenarios: On the one hand, there must be a wide range of expectations or conceivable developments (high uncertainty); on the other hand, the axes must be able to reflect the relevant differences in the conceivable developments. The following aspects were then worked out from an intensive analysis of the sources that deal directly or indirectly with the topic of the future world order:

- Number of configurations that characterise the world order
- Stability of these configurations

Figure A1 illustrates the wide range of expectations along these two axes.

Figure A1: Supporting the two main axes with arguments from the sources



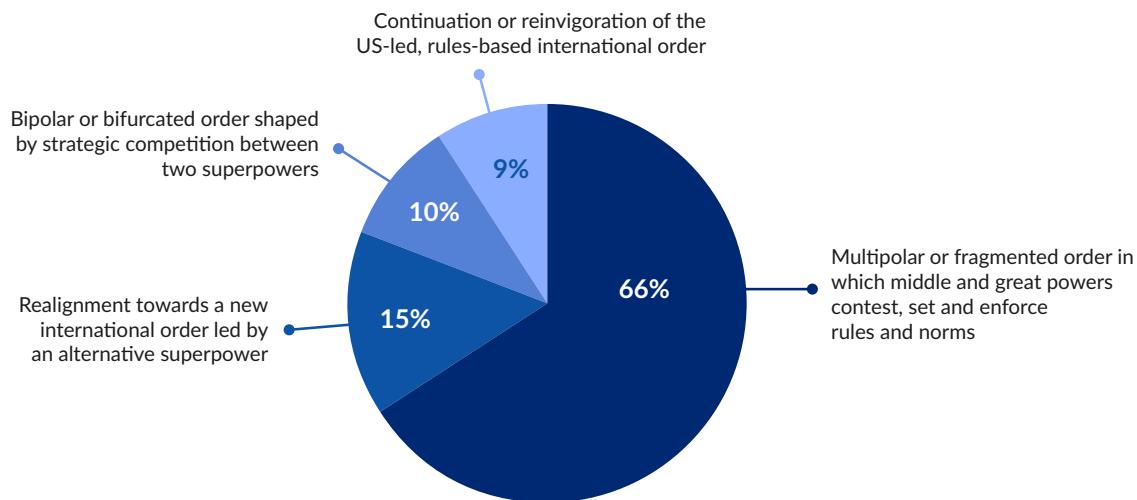
Source: own representation Fraunhofer ISI (2025).

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The worldwide expert survey of the Global Risk Perception Survey of the World Economic Forum (WEF) (Figure A2) shows that the number of configurations was also used here as a central decision-making criterion for possible world orders.

Figure A2: Results of an expert survey conducted by the World Economic Forum

Which of the following best characterizes the global political environment for cooperation on global risks in 10 years? (981 respondents)

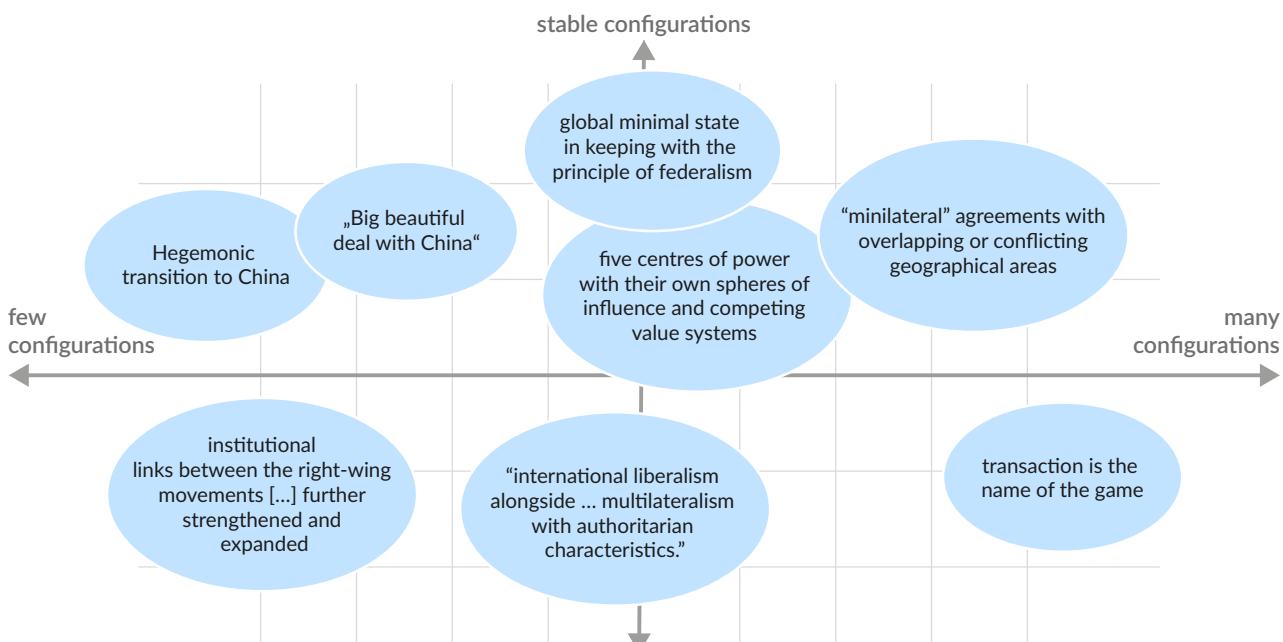


Source: World Economic Forum Global Risks Perception Survey 2022–2023

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In a second step, the possible “world orders” directly mentioned in the sources were mapped along these axes (Figure A3). It turned out that – as expected – there is a wide spread along both axes.

Figure A3: Assignment of source citations in scenario axes

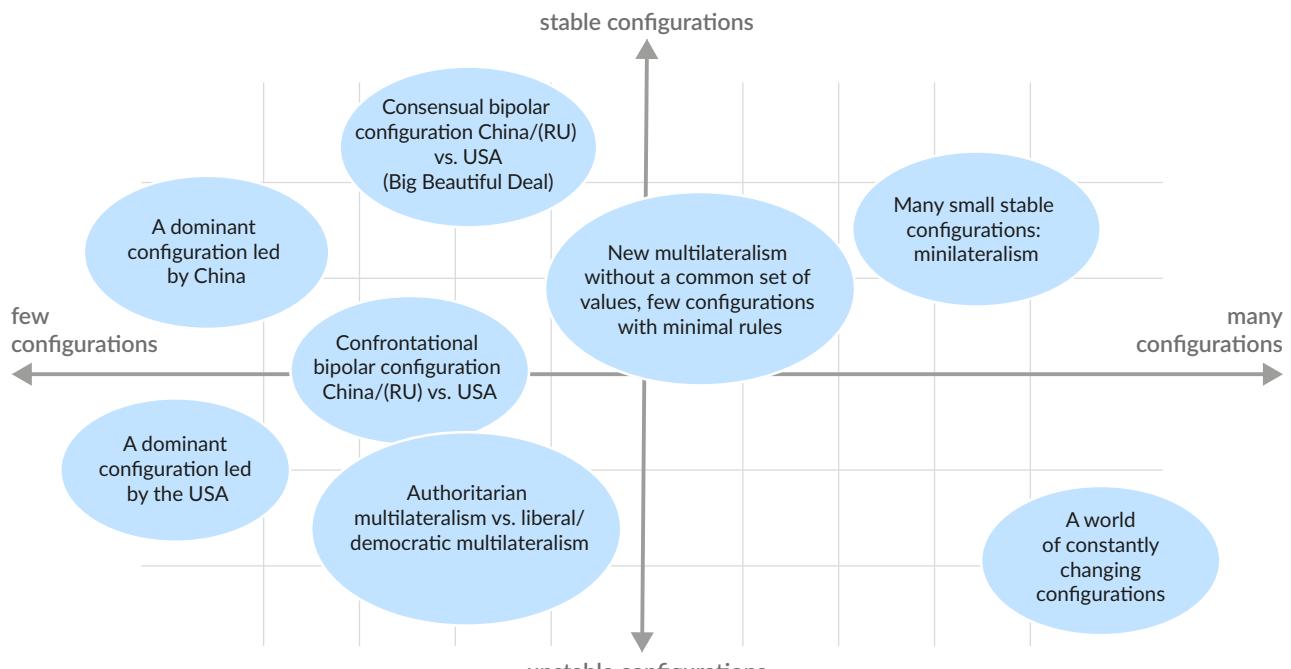


Source: own representation Fraunhofer ISI (2025).

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Finally, initial “scenario seeds” were developed from these statements by slightly focussing and abstracting the statements (Figure A4). With this input, we started the interactive process with the workshop participants.

Figure A4: First scenario seeds



Source: own representation Fraunhofer ISI (2025).

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The scenarios were developed and fields of action for Europe were derived in a collaborative process involving experts and stakeholders from different backgrounds and with different perspectives. The process comprised three workshops, two of which were held on a broader scale and one on a smaller scale with the extended project team. Based on the initial findings, additional workshops and discussions were held.

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