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Competing visions, shifting power: Key challenges for global development in 2026

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IDOS POLICY BRIEF 36/2025



Competing Visions, Shifting Power: Key Challenges for Global Development in 2026

Stephan Klingebiel & Andy Sumner

Summary

The global development landscape entering 2026 is shaped by deep geopolitical disruptions, significantly intensified by the return of President Trump and the acceleration of systemic rivalry, conflict and multipolar competition. Development policy now unfolds in an environment where multilateral norms are weakening, Western cohesion is fracturing and Global South actors increasingly exercise greater agency through strategies of multi-alignment. Cuts to ODA budgets across traditional donor countries, paralysis in the UN development system and US hostility towards Agenda 2030 have collectively unsettled the development architecture, prompting a proliferation of commissions and processes seeking to rethink future cooperation. We identify four issues that we think will be of high importance for global development policy in 2026 and beyond and situate these within the context outlined above.

Issue I. China's transition towards high-income status and the implications for its evolving role in global development debates Economically, China is approaching graduation from the list of ODA-eligible countries of the Organization for Economic Co-operation and Development's (OECD) Development Assistance Committee (DAC), yet politically it continues to claim "developing country" status as part of a deliberate strategy to anchor itself within Global South coalitions. This duality provides significant diplomatic and narrative leverage. China's expanding suite of global initiatives – from the Belt and Road Initiative to the new Global Governance Initiative – gives it increasing influence over international agenda-setting, especially as some Western actors retreat from traditional development roles. OECD countries must, therefore, craft engagement strategies that can accommodate China's hybrid positioning while defending coherent standards for global responsibility-sharing.

Issue II. Russia's influence in the Global South Although Russia lacks a credible development model, it wields significant spoiler power through arms provision, disinformation operations and especially nuclear energy cooperation. Rosatom's integrated nuclear packages are appealing to many African countries, creating long-term dependencies and expanding Moscow's geopolitical reach – an area largely overlooked in Western development strategies.

Issue III. The rise of non-democratic governance across much of the Global South and its consequences for global governance With the majority of the population now living in electoral autocracies or closed autocracies, democratic backsliding undermines the foundations of global governance. Normative contestation, institutional fragmentation, legitimacy deficits, geopolitical bargaining and uneven provision of global public goods increasingly shape multilateral cooperation.

Issue IV. How both Southern middle powers and smaller countries are adjusting to the changing environment Countries such as Brazil, Indonesia, Turkey, South Africa and the Gulf states are capitalising on systemic volatility to expand influence through multi-alignment, new coalitions and diversified cooperation instruments. For external actors, accepting multi-alignment as a stable feature will be essential for building effective, issue-based partnerships in areas such as climate, health, food systems and digital public infrastructure.

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Introduction

Recent years have been dominated by fundamental shifts in the global sustainable development discourse and in development cooperation as a policy field. This is, of course, directly related to significant changes across all main areas of international relations. Much more pronounced systemic conflicts between the US and other Western actors on the one hand and China on the other, the return of international war to Europe because of Russia's invasion of Ukraine in early 2022 and the overall rise of actors, such as the BRICS+ (Brazil, Russia, India, China, South Africa, plus the new member countries), in the Global South have contributed to a new international landscape.

Geopolitics and geoeconomics have become dominant factors in many respects. Southern actors now have many more choices and very often opt, either implicitly and increasingly explicitly, not for alignment with a specific country or country group but for "multi-alignment" based on their own interests.

The return of President Donald Trump has accelerated several of these trends and introduced additional dynamics into an already rapidly changing world. Among these more pronounced trends are often populist framings of global affairs (including anti-multilateralism), the return of hard power politics, transactional short-term considerations in international relations and the weakening cohesion of a formerly well-defined Western alliance.

President Trump's return to the White House marks, in many respects, a shift for sustainable development and development cooperation. The dismantling of the US development cooperation system emerged as one of the first symbols of policy change in the second Trump administration. These changes reflect a "New Washington Dissensus" (Sumner & Klingebiel, 2025b), which not only breaks with the former bipartisan US consensus on development, but also departs from long-standing international norms on sustainable development and development cooperation.

The disruption of the US development system and its implications for the entire international development architecture have caused a major shockwave since January 2025 (Opalo, 2025; Usman, 2025). Its consequences for the global system are still far from clear. Cuts to official development assistance (ODA) have become a defining feature not only in the US but also in other donor countries, such as the UK, the Netherlands, France and Germany. The UN system, including the UN development system, has been largely paralysed as the UN80 reform agenda is essentially focussed on cost-cutting and efficiency. The development architecture anchored in the OECD, with its governance function for development cooperation, is searching for new framings, new justifications for ODA, and new governance structures for development cooperation as the period to discuss any post-2030 framing becomes narrower. Already in March 2025, the US administration described the existing framing of Agenda 2030 and its SDGs as being adverse to the US interests:

> We have a concern that this resolution is a reaffirmation of Agenda 2030 and the Sustainable Development Goals (SDGs). Although framed in neutral language, Agenda 2030 and the SDGs advance a program of soft global governance that is inconsistent with US sovereignty and adverse to the rights and interests of Americans. (United States Mission to the United Nations, 2025)

At the same time, a number of initiatives, commissions and conferences are being launched or will conclude in 2026 to reimagine and rethink the future of development cooperation. There will be a notable cluster of initiatives aimed at re-imagining and repositioning development cooperation. These include the *Future of Development Cooperation Commission*, supported by the Gates Foundation and organised primarily by the Center for Global Development (CGD) (with results expected in the spring of 2026); the United Kingdom's planned conference on international development cooperation convened by the Foreign, Commonwealth & Development Office

(FCDO) (likely in the spring 2026); a new edition of a North-South Commission announced by the German government (timeline still pending); and an OECD conference on the future of development cooperation (planned for May 2026). At the same time, the DAC is pursuing a review process concerning the definition and conceptual purpose of ODA and the DAC's institutional role and outreach.

Taken together, these initiatives indicate renewed activity among actors committed to maintaining a role for international development cooperation. Their analytical value lies not merely in convening stakeholders but in potentially shaping the strategic direction of cooperation frameworks at a moment when they face mounting political and conceptual pressures. Whether these efforts can generate meaningful counter-momentum depends on their ability to produce coherent framings, viable reform pathways and proposals that resonate beyond expert communities.

In this context, the pressure for reform is substantial, but the strategic direction remains uncertain. One important task will be to prioritise: to identify what belongs at the top of the issues list and how those issues may co-evolve, and how to deprioritise issues that are less critical or that may simply be "fog" in an international landscape where every day brings new ideas and initiatives. In short, this is the context in which the year 2026 is beginning. In this paper, we aim to bring some structure to the turbulence shaping global development discussion and development cooperation to help strategise around the issues. In this paper, we seek to frame the key challenges of 2026 and beyond to help decision-makers, the broader global development policy community and think tank analysts reflect on what matters.

The context: global development system disruption

Was President Trump's approach to the US development cooperation system a chaotic, step-by-step process, or did it actually follow something that might be regarded as a strategy? And what does this imply for what we should expect from the US administration in 2026 and beyond?

What President Trump, and, over several months, Elon Musk in his role for the Department of Government Efficiency (DOGE), intended was not obvious from the very beginning. The Heritage Foundation's blueprint *Project 2025* was far less aggressive with regard to development cooperation (Klingebiel & Baumann, 2024) compared with what the US administration has done since early 2025. At the same time, however, the foundations for dismantling the US development cooperation system and for defunding and destabilising the international development cooperation architecture were strategically laid from day one of the new administration.

On 20 January 2025, the day of his inauguration, President Trump set a 90-day deadline to review US development cooperation ("Reevaluating and Realigning United States Foreign Aid"). Another deadline, issued on 2 February 2025, this time 180 days, called for a review of US participation in and support for international organisations ("Withdrawing the United States from and Ending Funding to Certain United Nations Organizations and Reviewing United States Support to All International Organizations"). Both reviews followed unclear criteria: What were the standards for the review? Who was conducting the analysis? What outcomes were expected?

Some clues can be found in the questionnaire to ODA recipients that identified a set of core values implicitly as well as budget requests made by the Trump administration to congress. These suggest five principles (for data sources, see Klingebiel and Sumner, 2025a): (i) dismantling global governance, meaning anti-UN, anti-SDGs; (ii) ideological policing and loyalty tests against "anti-Americanism"; (iii) border securitisation and the use of development cooperation as a migration deterrent; (iv) erasure of climate and DEI and disqualification of "woke" activities and (v) transactional nationalism and the use of development cooperation in terms of its return on investment for the US economy.

What remains of US development engagement seems that it will be channelled through the Millennium Challenge Corporation (MCC) and the US International Development Finance Corporation (DFC) (established under the first Trump administration) (Hruby, 2025). Both MCC and DFC were retained because they dovetail with US geoeconomic priorities, such as competing with China on infrastructure and securing supply chains for critical minerals. Under guidance from the White House, MCC programmes are increasingly focussed on areas where US strategic interests and developing-country needs intersect. One pillar of this is critical minerals: MCC compacts are now explicitly looking to facilitate US access to resources like rare earth elements, lithium, cobalt and nickel, which are essential for semiconductors, electric vehicles and defence technologies. For example, one could envision MCC compacts in resource-rich countries (such as in Africa's Copperbelt or lithium-rich Latin American states) that fund transport infrastructure, regulatory frameworks or power grids specifically to support new mines with the understanding that these mines will supply global markets independent of Chinese control.

Parallel to this, the Development Finance Corporation (DFC), created in 2019 by merging Overseas Private Investment Corporation (OPIC) with other programmes, has assumed a front-line role. The DFC offers loans, equity investments and insurance to private sector projects abroad, with a mandate to catalyse investments that align with US foreign policy goals. Under the second Trump administration, the DFC has also focussed on deals that can advance US geoeconomic advantages. The DFC has backed rare earth processing expansions and even railway upgrades in Africa aimed at speeding the transport of copper and cobalt from the Democratic Republic of Congo couched as diversifying away from Chinese-controlled logistics. Another area where the DFC remains active is in infrastructure financing that offers an alternative to Belt-and-Road loans in, for example, supporting telecom networks, ports or solar farms in Indo-Pacific nations where the US seeks greater influence. The key distinction of DFC projects is that they must have a clear commercial logic (partnering with US or local firms) and strategic rationale. The MCC and DFC form the backbone of what looks like a paradigm of "development cooperation" but that is narrower, transaction-driven and explicitly tied to US geostrategic competition and business interests.

Even before the respective deadlines were reached, it became evident that the second Trump administration would take a far-reaching approach. What became even clearer in the autumn and early winter of 2025 is that the US administration is not merely indifferent to the international sustainable development discourse but is actively seeking to establish an entirely different discourse. The withdrawal from the Sevilla FFD (Financing for Development) (June/July 2025) following an attempt to wreck the agreement is one example. Further examples occurred at the level of the G7 and its development ministers, at the OECD, and in development debates within the G20 (Sumner & Klingebiel, 2025a). It is widely assumed that the US, as the G20 host in 2026, will likely discontinue convening a Development Working Group (DWG) and may also restrict outreach activities to representatives from the Global South.

We should not exclude the possibility that the US administration may even attempt to prevent other actors from continuing a sustainable development dialogue outside structures in which the US serves as host or exercises dominant influence. Therefore, any forward-looking analysis for 2026 must consider the possibility that the US may seek to aggressively undermine the international architecture of development cooperation and the broader sustainable development agenda. Indeed, the anti-SDG approach to FFD in Sevilla suggests the US would not support the development of a post-2030 agenda.

There are indications that the Trump administration is attempting to halt discussions whenever they are not aligned with its own priorities,

including the use of additional tariffs by President Trump as punishment in non-trade-related contexts, as well as threats directed at diplomats. For example, in negotiations on green shipping rules, the maritime carbon tax illustrates what a coordinated and strategically applied US bullying approach may entail (supported by Russia and China) and with the EU rather than a small country (Politico, 2025a, 2025b).

It remains unclear how far the US administration is prepared to go in matters related to development. At the same time, President Trump has already been quite successful in making many governments act extremely cautiously on any issue that might trigger displeasure in Washington (e.g., climate change negotiations at the COP (Conference of the Parties)). Decision-makers should therefore consider the possibility that the Trump administration will actively attempt to shut down discussions on the global development architecture, or that other governments, anticipating conflict with the US, may prefer to avoid engagement in this substantive field.

Development actors (development-oriented countries, international organisations, etc.) should assume that an outward-facing US disruption remains plausible and plan accordingly.

Four issues of high importance for global development in 2026 and beyond

We identify four issues that we think will be of high importance for global development policy in 2026 and beyond and situate these within the context outlined above. The selection is based on numerous ongoing discussions and interviews with experts and expert groups over recent months, as well as on our own subjective judgment. Inevitably, there will be a number of other issues that could be included, so we do not suggest this list is exclusive. We focus on trends in the Global South; therefore, we do not address important developments in Europe, North America or other regions, such as the significant rise of populism or the growing constraints on public budgets.

Issue I: Anticipating China's high income country status and understanding China's role in the global development discussions

China's likely transition to high-income status is projected for the near future. This creates a growing tension between its economic reality and its continued political self-identification as a "developing country". Under DAC rules, once a country crosses the GNI per capita high-income threshold, it is only ODA eligible for an additional three years. In this sense, it is difficult to label China as a "developing country".

However, the "Global South" is a political category, and in this regard, China will continue to position itself and be perceived as part of the Global South well into the future. This deliberate self-designation anchors China within Global South coalitions, allows it to frame its foreign policy as an expression of solidarity rather than of hegemonic ambition, and preserves its flexibility regarding global responsibilities and burden-sharing, particularly in the areas of climate finance and development cooperation. This dual status as an emerging great power that still claims to belong to the developing world provides China with an unusual degree of diplomatic room to manoeuvre.

The implications for global governance and development cooperation are substantial. China's ability to speak simultaneously as a major global actor and as a representative of the Global South enables it to shape norms, expectations and priorities in multilateral settings in ways that neither OECD countries nor traditional developing countries can easily match. The political leverage inherent in this dual role strengthens China's position in agenda-setting debates and enhances its appeal to partner countries, many of which perceive China as a more relatable or less conditional actor than Western donors.

For Europe and the broader Western community, this evolving landscape presents both challenges and opportunities. China's continued political claim to a "developing country" status complicates efforts to define equitable burden-sharing arrangements, whether in climate finance, global taxation

or concessional development funding, and will require a more coherent European strategy on differentiation and responsibility, for example. OECD countries need to take seriously China's sustained influence across the Global South, including its narrative power. Counter-narratives rooted in conditionality or defensive framing will be insufficient; instead, OECD countries must develop more credible engagement formats that recognise partners' agency and avoid casting China solely as a rival. At the same time, this moment offers opportunities to recalibrate cooperation through targeted dialogue with China on global public goods.

Box 1: China's five global initiatives

- Belt and Road Initiative (BRI) (2013): the core of China's economic diplomacy in the Global South
- Global Development Initiative (GDI) (2021): promotes a competing development narrative
- Global Security Initiative (GSI) (2022): includes six peace and security components and aims, among other objectives, to safeguard BRI investments
- Global Civilisation Initiative (GCI) (March 2023): positioned as an alternative to "Western claims of civilizational superiority and the 'clash of civilizations'"
- Global Governance Initiative (GGI) (September 2025): built around five principles: (i) sovereign equality, (ii) respect for international law, (iii) commitment to multilateralism, (iv) people-centred approaches and (v) a focus on concrete, actionable outcomes

This is especially so as China's developmental footprint across the globe is already substantial. Its five major global initiatives beginning from the Belt and Road Initiative (BRI) launched in 2013 to the newly announced Global Governance Initiative (GGI) of 1 September 2025 and all are highly relevant to contemporary international policy debates. The GGI is particularly significant at a time when the counter-narrative of the current US administration is explicitly anti-multilateralist and fundamentally critical of the UN and global sustainable development efforts. China's global relevance will likely continue to shape international agenda-setting. This influence derives not only from its "hard power" (military capabilities and geopolitical reach) but increasingly from its "soft power," including economic cooperation instruments and diverse forms of development cooperation. China's role may be further amplified by the retreat of several Western countries from traditional development cooperation commitments.

Issue II: Understanding Russia's role in the Global South as a power of disinformation and nuclear offers

Russia's capacity to provide a coherent development narrative or a credible development cooperation model will remain limited (Novoselova, 2025). Nevertheless, Moscow has demonstrated an ability to shape international agendas and influence actors in the Global South by acting as a spoiler (Ferragamo, 2023), despite its fundamental breach of international law following its full-scale aggression against Ukraine since early 2022.

Over recent years, Russia has relied on three core instruments: the provision of military services and arms, extensive propaganda and disinformation operations and targeted partnerships with African countries seeking to develop nuclear power capacities. All three areas have been the subject of growing analytical attention. An often-underestimated dimension, however, is Russia's role in nuclear energy cooperation. More than 20 African countries have expressed interest in pursuing nuclear energy (IAEA, 2025), and Russia, primarily through its state-owned company Rosatom, offers attractive packages combining technology, financing, training and operational support. For many governments, these offers provide long-term energy solutions that Western actors are either unwilling or unable to match. However, safety and security are likely to be concerns as is the fact that Rosatom retains ownership and operational control of the reactor for a period of time, raising worries about its use as leverage. Another key factor is the geopolitical motivation of partner governments. For some regimes, embra-

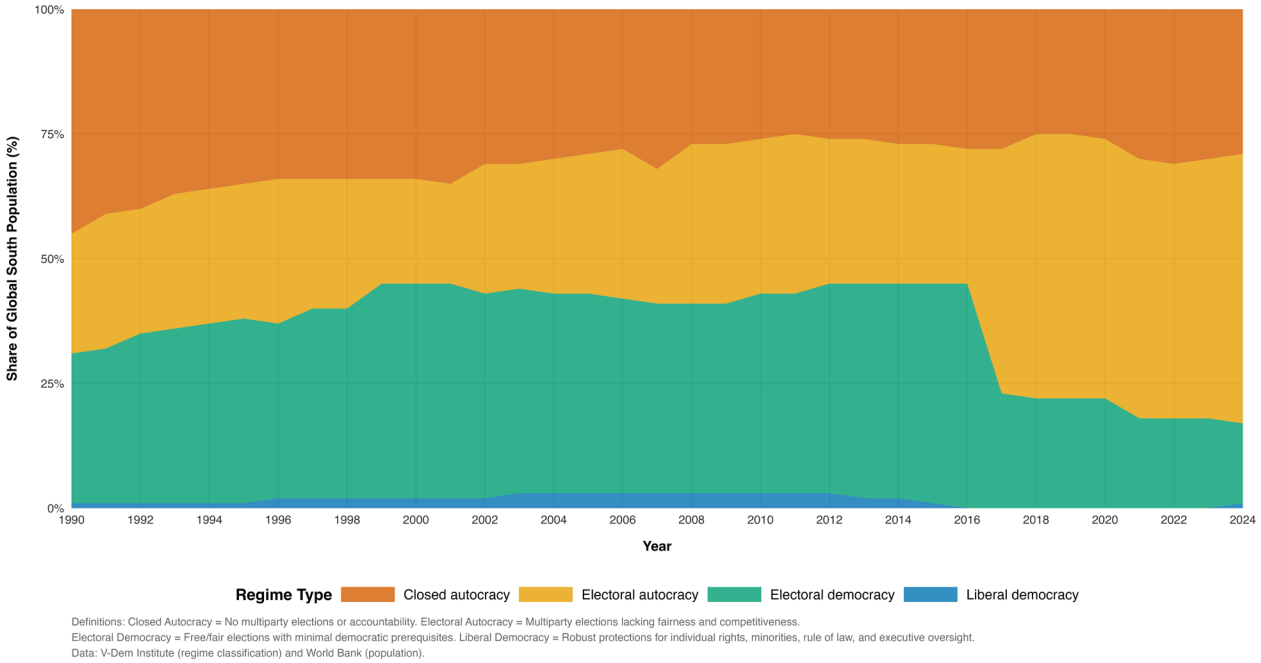
cing Russian nuclear assistance may be a way to bolster their international standing and assert autonomy from Western influence.

The implications for sustainable development in African countries are significant and merit closer examination. Nuclear energy partnerships shape national energy strategies, create new dependencies and expand Russia's geopolitical reach. For OECD development cooperation actors, this constitutes a blind spot: nuclear power is typically outside their portfolios, resulting in limited engagement and an underestimation of Russia's central role in this field. If unaddressed, this gap may further expand Moscow's influence in parts of the Global South and constrain alternative pathways for sustainable energy transitions.

Issue III: Non-democratic countries in the Global South become an increasing challenge to development cooperation and to global governance

The political landscape across parts of the Global South is becoming harder to read and is marked by democratic backsliding. The Varieties of Democracy (V-Dem) project at University of Gothenburg has been compiling expert-coded indicators of electoral, liberal, participatory, deliberative and egalitarian democracy for 202 polities since 1789. Its "Regimes of the World" typology classifies countries as liberal democracies, electoral democracies, electoral autocracies or closed autocracies (see Varieties of Democracy, 2025). Its most recent data (for 2024) shows that approximately 80 per cent of the Global South population now lives in autocracies though largely "electoral autocracies" (see Figure 1). Electoral autocracy denotes regimes where multiparty elections exist in law, but elections are not meaningfully free or fair and core democratic safeguards, such as media freedom, associational autonomy and civil liberties, are systematically weakened. Support for democracy itself has also fallen. In Africa it has fallen by about seven percentage points over the past decade, with sharp drops in several countries and rising tolerance for military rule (Afrobarometer, 2024). In Latin America, Latinobarómetro data show regional support for democracy declining to about 48 per cent in 2023, with growing indifference between democratic and authoritarian options (Latinobarómetro, 2024). These shifts suggest that backsliding is paired, in some contexts, with weakening popular attachment to democratic rule.

Figure 1: Political regimes in the Global South, 1990-2024



Source: Authors, based on Coppedge et al. (2025) and World Bank (2025)

The surge in military coups on the African continent over only a few years underscores how these shifts have become part of a broader trend rather than isolated events. Autocratic governments are also beginning to form more explicit alliances. The Alliance of Sahel States (AES) is a confederation of Mali, Niger and Burkina Faso under military rule and illustrates a new pattern of coordinated political positioning. External actors, notably Russia, are deepening relations with such regimes, further complicating the geopolitical landscape. In many countries on the African continent, Gen-Z protests are also combined with digital activism – for instance in Madagascar (2025), where regime change even resulted in part from such protests, which might provide additional opportunities for external manipulation. A common thread is deep disillusionment with the status quo and anger at elite impunity, lack of economic opportunity and the sense that promises of democracy or development have failed their generation. Even within the Global North democracy faces significant headwinds. Right-wing populist movements and leaders have surged into the political mainstream, often by exploiting public discontent and economic anxieties. These populist forces tend to embrace majoritarian nationalism.

The recent shifts affect not only domestic governance but also the institutions and norms that shape development cooperation. These institutions rely on at least minimal consensus among states. So, as democracy retreats, what happens to global governance? The idea of global governance refers to the set of rules, norms and institutions – both formal and informal – through which international actors coordinate action across borders. It does not imply a world government, but instead the management of shared problems in the absence of central authority. Since the end of the Cold War, this coordination has been loosely underpinned by a "liberal normative framework". While this framework was always unevenly applied and contested, it provided some common reference points. That base is now eroding – and this erosion carries consequences for development cooperation in at least five areas.

First, expect normative contestation to intensify. The liberal framing of global governance – centred on human rights, rule of law and transparency – is increasingly challenged. Sovereignty-focussed and state-centric models, promoted by governments such as China and Russia, are now more prominent. As a result, international organisations must navigate competing normative claims. This complicates agenda-setting and raises the likelihood of persistent deadlock, including on development issues once thought uncontroversial.

Second, expect institutional fragmentation to continue. Autocratic states may often remain inside international organisations but re-interpret or dilute institutional mandates. They also support parallel structures. These create overlapping and sometimes competing venues for rule-setting. The result is not institutional collapse, but fragmentation: a more disjointed and pluralised governance system. Development cooperation, too, is now channelled through an expanding number of competing platforms, often outside the OECD's DAC or UN frameworks.

Third, legitimacy will become more contested. Multilateral institutions depend not only on state participation but on public legitimacy – particularly in democracies. As autocratic influence grows, perceptions of bias, weak accountability or selective enforcement may become more widespread. This fuels political backlash in democratic settings, affecting the willingness of the public and parliaments to fund or comply with multilateral decisions. In development cooperation, we already see this dynamic in growing criticism of traditional aid institutions and in the redirection of ODA budgets towards national interest priorities.

Fourth, expect politics to displace any sense of a rule-based consensus. Development cooperation institutions may increasingly serve as sites of geopolitical bargaining. Authoritarian states can use development finance, trade agreements and technical standards to influence outcomes and form voting coalitions. In the multilateral development banks, for example, human rights language has been diluted through coordinated interventions. In

response, democratic governments have created selective networks – such as the Alliance for Multilateralism, initiated by France and Germany – to coordinate policy and defend existing norms. These networks now shape development cooperation in parallel with formal institutions.

Fifth, global public goods provision and development cooperation will become more fragmented too. Autocratic regimes may act decisively on certain transnational challenges where elite consensus exists – such as infrastructure provision or epidemic response. However, where interests diverge, collective action falters. Climate transitions, digital governance and migration remain highly contested. In these areas, universal regimes often give way to ad hoc or issue-specific coalitions. Development cooperation, especially in climate finance, increasingly follows this logic, with fragmented approaches replacing shared frameworks.

The retreat of democracy does not mark the end of global governance. But it does transform its character. Governance becomes more contested, more fragmented and increasingly reliant on smaller, functionally or politically aligned coalitions.

In the near term, more systematic analytical work and scenario-building are needed to assess how the rise of non-democratic governance in the Global South could reshape both the substantive priorities and political dynamics of development policy. Moreover, improving our understanding of the interaction between democratic recession in the US and other Western countries, on the one hand, and political shifts in the Global South, on the other, will be essential for anticipating the future of global governance and cooperation. These changes also need to be a crucial part of reflections on what outreach to Southern partners should look like in the future.

Issue IV: Understanding how both Southern middle powers and smaller countries are adjusting to the changing environment

A group of middle powers – including Brazil, Turkey, Indonesia, South Africa, Saudi Arabia, the United Arab Emirates and others – has emerged as influential actors on the global stage, creating a mid-layer of multipolarity and offering poorer countries a broader menu of cooperation options. The status quo is increasingly being questioned by those who argue that the existing international framework is no longer fit for purpose. Western leadership, including that of the US, is being challenged – and in some cases even supplanted – as reflected in the growing prominence of South-South cooperation and the rise of relatively new institutions, such as the New Development Bank (NDB) and the Asian Infrastructure Investment Bank (AIIB) (Chaturvedi et al., 2021). However, multilateralism has never been fully universal or uncontested; longstanding institutional limitations and normative divergences have persisted throughout (Ishmael et al., 2025).

The shifting global landscape presents significant opportunities for a broad range of non-Western actors. From Indonesia to countries on the Arabian Peninsula, many governments interpret the current instability of the global order less as a threat and more as a window of strategic possibility. The diffusion of global power enables even relatively small states to expand their leverage, diversify partnerships and engage in forms of “multi-alignment” that were previously more constrained.

Countries endowed with various forms of strategic resources, whether financial capacity, critical minerals or geostrategic positioning, are increasingly using these assets to strengthen their international influence. They do so through a mix of commercial engagement and, in some cases, concessional or quasi-development cooperation instruments. These approaches allow them to shape regional and thematic agendas more actively and to expand their networks across the Global South. Actors beyond the Global South should accept multi-alignment as a stable feature. This implies issue-based coalitions with middle powers and Gulf actors on climate change related topics, including health security, food systems, digital public infrastructure and debt instruments, with joint financing and rotating leadership.

Conclusion

The defining features of 2026 and the near future will be the interaction of US norm contestation, China's dual status, Russia's spoiler role, democratic backsliding in the Global South with significant implications for global governance and the widening field of multi-alignment options. The early-warning signals to track in 2026 and beyond include US behaviour as G20 host and within the G7 on development diplomacy, including any move to curtail the Development Working Group or block parallel dialogues; visible consolidation of autocratic alliances and their external patrons and the pace and locus of post-2030 agenda preparation, inside or outside UN forums.

It is likely there will be a set of flashpoints or battle grounds. **First, narratives will be a central battleground.** Populist actors in many countries have shown a strong capacity to reshape public perceptions and influence political decision-makers' views on development policy. In this context, the feasibility of forming a unifying narrative across Western countries appears limited. Yet precisely because the discursive environment is increasingly shaped by populist framing, there is a need for like-minded actors to articulate at least a minimal shared understanding of global sustainable development. Such a consensus may need to diverge from previous approaches, which relied on extensive intergovernmental negotiation producing formal agreements; a more flexible, politically salient narrative may be required.

Second, existing development cooperation principles reflect an earlier paradigm. The aid and development effectiveness agenda has lost political traction at senior levels. Simultaneously, the rationale for allocating ODA is shifting: decisions increasingly follow donors' political priorities, such as migration management or climate mitigation, often at the expense of development-effectiveness considerations. This disconnect between established principles and actual practice is insufficiently acknowledged in current debates, reducing the effectiveness of both policy reform discussions and accountability mechanisms.

Third, the current architecture will be a flashpoint as it is ill-suited to an era of declining and less programmable ODA. Political commitments and fiscal realities are diverging. For example, while the EU reaffirmed the 0.7 per cent ODA/GDP target at FFD in Sevilla, several EU member states explicitly pursue reductions in aid budgets and no longer intend to meet their targets. This misalignment undermines credibility, fragments debates and signals a need to recalibrate expectations and instruments within development cooperation to fit a more resource-constrained environment.

Fourth, beyond Agenda 2030 and its SDGs will be a major crunch point. The preparation process will include the Global Sustainable Development Report (2027), drafted by an independent group of scientists, which will inform the SDG Summit scheduled for September 2027. However, basic assumptions about the core concepts of global sustainable development remain, to a large extent, unclear among several governments.

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