CESEDEN

Strategic Panorama 2026

Instituto Español de Estudios Estratégicos

ieee.es
Instituto Español de Estudios Estratégicos

MINISTERIO DE DEFENSA

Strategic Panorama 2026

Instituto Español de Estudios Estratégicos

ieee.es

Instituto Español de Estudios Estratégicos

MINISTERIO DE DEFENSA

Catálogo de Publicaciones de Defensa
publicaciones.defensa.gob.es

Catálogo de Publicaciones de la Administración General del Estado
cpage.mpr.gob.es

publicaciones.defensa.gob.es
cpage.mpr.gob.es

Edita:

MINISTERIO DE DEFENSA
SUBSECRETARÍA DE DEFENSA
SECRETARÍA GENERAL TÉCNICA

Paseo de la Castellana 109, 28046 Madrid

NIPO 083-21-219-5 (edición en línea)
ISSN 2792-2510 (edición en línea)
Fecha de edición: septiembre de 2026
Maqueta e imprime: Imprenta Ministerio de Defensa

INDEX

Page

Page

Chapter Eight

Introduction

Navigating the geopolitics of uncertainty

José M. de Areilza Carvajal[1]

We are experiencing a rapid transition to a world order very different from the one that emerged from the Second World War. It is one of those moments of dizzying transformation that occur only once every few years. This new edition of the *Strategic Outlook* offers a perspective from Spain to diagnose the entry into a new geopolitical era. At the same time, wherever possible, forecasts are drawn up to anticipate the political, economic, technological and social changes currently underway. The question running through this work is how these changes will shape the decision-making of governments and other international actors in areas such as security and defence, economic and technological development, or the defence of democracy and human rights. It is a collaborative and rigorous work, in which each author is responsible for their own opinions and arguments. The combination of different voices and perspectives crystallises into a measured and long-term analysis—something by no means easy to achieve, but increasingly urgent and necessary.

1 Chair of the 'Strategic Outlook 2026' working group. Full professor and holder of the Jean Monnet Chair at ESADE, and Secretary-general of the Aspen Institute Spain.

Europe is described in our time as a Kantian territory in a Hobbesian world, which must learn the language of power. This contrast underlines Europe's shortcomings in defending its interests and projecting its values abroad, and the imperative to equip itself with a common and strengthened foreign, security and defence policy. Until recently, most Europeans had assumed they would always live in an interdependent and connected world, governed by rules and managed by multilateral organisations, in which negotiation and diplomacy were the appropriate tools for resolving problems. During the long years of the Cold War and then the Pax Americana, the market economy, democracy and human rights took root in an increasing number of countries. Economic, political and moral progress seemed an indivisible force. It was only a matter of time before it reached regions still far removed from Western standards.

The world of yesterday will not return, but Europe's determination to shape the future without abandoning its values or the lessons of the past remains the right path: while the European Union acquires greater strategic autonomy, it cannot abandon the practice of negotiation and diplomacy, must continue to support the work of multilateral organisations, and must trust in the beneficial effects of economic interdependence. This 'path dependency' is based on a set of principles that define the best of European civilisation. It would be contradictory to abandon the idea that these ideals should guide the pursuit of moral and material progress in our time and inspire a renewed drive for European integration.

The continent's integration process is an undeniable historical success, but it faces serious difficulties in reinventing itself and launching a programme of urgent reforms in three major areas—security, the economy and politics—despite the abundance of clear and accurate diagnoses. The challenge facing Europeans is not only to develop their own capabilities in security and defence, but also to address two equally important challenges at the same time: fixing the European economic engine to capitalise on the technological revolution, and confronting the threats to and fractures within democracy, both in the EU and in the member states.

In other periods of history, rivalries between countries, the threat or use of force, and power relations defined the international order, but this was supposed to have been overcome after the descent into hell during the Second World War. After a long hiatus of eighty years, Europeans are now confronted with a dangerous, dark uncertain world of rivalries between great powers, for which they are unprepared.

The new geopolitical era is dominated by the imperative of national security and is shifting from multilateralism to a multipolar rivalry that undermines international law and the protection of human rights. Nuclear proliferation is once again a challenge for which there are no longer sufficient instruments of international control.

In this context, Donald Trump's return to power has been unsettling news for the Old Continent, with his personalised vision of a zero-sum game in relations with allies, in which interdependencies are vulnerabilities that he exploits and monetises time and again. If one considers the interests and values of the United States, the Western superpower ought to be the best ally European countries have in a world less influenced by Western ideas. However, the Trump administration has ceased to understand the value of alliances—a concept that China, with its asymmetrical view of relations with other countries, is also unable to embrace.

The dual objective for Europeans of managing the shocks coming from the White House while continuing to be the best possible allies—accommodating, negotiating, resisting, buying time, accelerating pending European reforms—is by no means easy to implement. Neither the Union nor the member states possess the means or the cohesion to achieve, in the short term, the strategic autonomy needed to address the weakening of the transatlantic relationship and growing security threats, foremost among them Russian expansionism. Dependence on the United States in defence and technology, and to some extent in energy, is enormous. The gap in military and technological capabilities means that Europe's collective economic weight cannot be sufficiently leveraged, nor can alternatives be improvised quickly. The increasing pressure from Washington—on trade, digital regulation, defence investment, sanctions against third parties, support for far-right parties, intervention in countries such as Venezuela, or threats against Greenland, an autonomous territory of an EU member state and NATO partner—is seriously affecting the Old Continent, which is wondering how to deal with the new US doctrine of 'aggressive unilateralism', as aptly termed by Jake Sullivan last summer in Aspen, Colorado. The second presidency of a disruptive and revanchist politician is a triple shock to the continent's defence, economy and democracy.

China's latest moves in its quest for global hegemony complete a highly complex geopolitical landscape for Europeans. Under the leadership of Xi Jinping, a far cry from the 'peaceful rise' initiated by Deng Xiaoping, the Asian power seeks regional, but also global influence through diplomacy, technology, trade, investment in infrastructure and rapidly expanding armed forces. It does so, above all, due to internal security, to maintain the Chinese Communist Party's iron grip on the capitalist-Leninist regime that has lifted 800 million people out of poverty.

The Beijing regime needs to secure supplies of food, energy and raw materials, neutralise minority groups in Xinjiang, Tibet and Hong Kong, advance towards the takeover of Taiwan, and break the pressure from the United States and its Asian allies that is limiting its regional maritime influence. As Kevin Rudd has explained, Xi Jinping has shifted to the left in his economic policy, guided by the Marxist idea of ideological and social control, and to the right in his international policy, inspired by an ultra-nationalism that is leading him, for the first time, to export his political and economic model He takes advantage of the inconsistency of US foreign policy, which oscillates between isolationism and chaotic neo-imperialism. China is the only country in the world that can and wants to reshape the international order in line with its values and interests. In its 'no limits partnership' with Russia, there is a division of roles whereby China presents itself as the responsible power, seeking stability and supporting multilateralism, while a declining Russia, guided by an imperial vision, becomes a disruptor of the world order and an exporter of instability.

The Strategic Outlook 2026 analyses some of the major issues arising from this entry into a new geopolitical era, with contributions from experts from the academic, diplomatic and military worlds.

First, Ambassador Fidel Sendagorta explains in his chapter on the United States that this great nation is undergoing an identity crisis. The conservative world has set in motion a 'second American Revolution', based on the rise of populist nationalism. This movement aims to halt what it perceives as a sense of decline. The liberal elites are said to have led the country into wars costly in both lives and money, while losing their sense of patriotism and undermining national identity, at the same time as favouring mass immigration and promoting a reprehensible form of multiculturalism.

On the international stage, the 2025 National Security Strategy has projected abroad the revolution of the new right represented by the MAGA movement, which marks the end of the liberal order promoted by previous administrations. The defence and promotion of the national interest becomes the sole guiding principle of US action, with a restrictive definition of the national interest that focuses on priorities and is not expansive. Nationalism underpins almost all positions on foreign and economic policy. However, the stark pursuit of its own economic interest, to the detriment of others, erodes trust with allies and partners and hampers the cooperation that the United States seeks to organise against China's unfair trade practices and its use of rare earths as a geoeconomic weapon. Ambassador Sendagorta also points out how the priority given to the Western Hemisphere is in fact an extension of the United States' security perimeter to all countries in the region, in order to tackle issues of immigration and drug trafficking more effectively. It is also a contemporary version of the Monroe Doctrine designed to exclude extra-continental powers and, specifically, China.

Next, Professor José Ignacio Torreblanca's chapter analyses the return of technology as a structural variable of international power. He argues that, just as in previous revolutions—agricultural, industrial and digital—contemporary technological innovations are reshaping the economy, state organisation and the global order. However, he shows that the current technological revolution has distinctive features: accelerated and global diffusion, the consolidation of the digital sphere as a domain of conflict, and the emergence of private companies as providers of infrastructure essential to sovereignty and security.

The text argues that competition between the US and China is driving dynamics of securitisation, selective decoupling and fragmentation into technological blocs, with direct consequences for standards, data, supply chains and alliances. The text examines with particular attention the EU's vulnerable position: strong in regulatory capacity, yet dependent on and vulnerable to the US and China for access to critical technologies. Building on this analysis, it proposes the establishment of European digital sovereignty as a prerequisite for preserving the EU's strategic autonomy, its democratic model and values, and its capacity for political and strategic decision-making. It analyses Europe's strength as a regulatory power alongside its lack of indigenous industrial capabilities in critical technologies, which exposes it to dependencies that result in extreme vulnerability to external coercion. Professor Torreblanca argues that regulation, on its own, is not sufficient to defend European sovereignty in an increasingly hostile geopolitical environment. Ensuring European technological security therefore requires an integrated strategy combining long-term industrial policy, instruments of resilience and deterrence against technological coercion, and enhanced protection of the democratic sphere against digital interference. The author concludes that technological sovereignty is the necessary condition for preserving the EU's decision-making capacity, democratic model and strategic autonomy in the international order of the 21st century.

In her chapter, Professor Eva Borreguero analyses how different middle powers have recalibrated their foreign strategies in order to reduce vulnerabilities and preserve autonomy in decision-making in a new, more unpredictable geopolitical environment marked by weakening multilateralism and intensified great-power competition. The study analyses the responses of India, Japan, Brazil and the United Arab Emirates, heterogeneous countries which, without openly challenging the existing order, have adopted pragmatic strategies aimed at expanding their room for manoeuvre through the diversification of ties, the development of flexible alliances and selective alignments.

Her analysis shows that, far from a logic of confrontation, these responses reflect adaptive pragmatism with differentiated expressions: while India and Japan strengthen supply chains and technological cooperation in the Indo-Pacific, Brazil capitalises on its agro-export profile and leadership in clean energy, and the United Arab Emirates consolidates its role as a logistics, energy and digital hub, with a growing emphasis on artificial intelligence and global connectivity.

Professor Inés del Arco provides a chapter on China and the intensification of its hybrid strategy towards Taiwan, to understand its impact both globally and within the European Union. Beijing seeks to alter the *status quo* without triggering an open conflict. Its military doctrine has evolved in relation to the concepts of hybrid conflict and its equivalents—such as the 'three wars' doctrine or cognitive dominance operations.

Taiwan is increasingly subjected to coercive military manoeuvres, disinformation campaigns, cyberattacks, legal warfare tactics and economic instruments used as incentives or punishments. Beijing aims to secure small victories within the *status quo* whilst preparing for a possible blockade of the island. Europe, for its part, is facing Chinese hybrid threats that pose growing challenges to democratic resilience and security. While Beijing learns from Russia and deploys similar tactics in other geopolitical scenarios, Taipei also innovates in democratic resilience and response measures that limit Beijing's advances and interests—although they cannot eliminate them entirely. The Taiwanese case analysed by Professor Del Arco serves as an advanced laboratory for understanding the contemporary nature of hybrid threats to democratic systems.

Professor José María Calvo-Sotelo contributes to this *Strategic Outlook* with a chapter analysing two challenges to European energy security: the Russian gas crisis and dependence on China for energy transition technologies.

He argues that it is very difficult for Americans and Europeans to chart a path of action to reduce the dominance of Chinese companies in industrial sectors so crucial to the energy transition. This has benefited from the 'import of productivity' from the Chinese economy, thanks to the lower cost of its products, be they solar panels, power electronics, batteries or electric vehicles.

In the future, Calvo-Sotelo explains, increasing the EU's economic security will involve restricting trade with China and seeking alternative supply chains that will undoubtedly be more expensive and less efficient in the early stages. This will result in higher costs for key energy transition technologies in which dependence on the Asian superpower is particularly high. As with Germany and Central Europe's reliance on Russian gas, Europe as a whole has reached levels of risk concentration with Chinese industry that are incompatible with its economic security. And the solution, as with Russian gas, will entail higher costs. The EU will need to seek alliances with third countries, also interested in reducing their dependence on China, not only to diversify access to natural resources but also to create new industrial capacity and alternative supply chains.

This edition of the *Strategic Outlook* includes two chapters on the Maghreb and Latin America, both regions of fundamental importance to Spain.

First, Professor Miguel Hernando de Larramendi reflects on the Maghreb states, their internal challenges and the strategies they deploy to navigate transformations in the international order. He examines how these states have consolidated authoritarian and technocratic governance models, with limited capacity to address structural problems and the socio-economic unrest of their societies.

At the same time, he describes how these countries have adopted pragmatic strategies aimed at strengthening their autonomy and maximising the defence of their national interests against a backdrop of weakening multilateralism and the waning centrality of Western liberalisation agendas. This adaptation translates into foreign policies based on multi-alignment, the diversification of partners and an increasingly transactional approach.

The European Union remains the region's main economic partner, but a selective, primarily discursive decoupling is taking place, aimed at expanding the scope for autonomy and negotiation in a context where levels of economic and security interdependence remain high. According to Professor Hernando de Larramendi's analysis, this process is accompanied by greater assertiveness in foreign policy, expressed through diplomatic crises, pressure strategies and sovereignty-focused discourse, whose uneven results and experimental nature introduce new factors of uncertainty and volatility into relations with traditional partners and the immediate regional environment.

At the regional level, the structural rivalry between Algeria and Morocco, centred on the dispute over Western Sahara and the competition for regional hegemony, continues to block any significant progress towards Maghreb integration. This zero-sum logic reactivates dynamics of blocs and axes that project bilateral competition into the Sahel and West Africa, with direct implications for regional stability and European interests.

Ambassador Guillermo Fernández de Soto and Professor Andrés Rugeles offer an analysis of Latin America in a complex world characterised by fragility, polarisation and fragmentation, under the geopolitics of uncertainty and strategic competition between the major powers. In this scenario, the authors propose, Latin America must deepen its integration and international engagement as systemic challenges of the utmost importance. This requires decisions that enable the construction of a 'Latin American Way' to maintain the best possible relations, simultaneously, with key players such as the United States, China, the European Union (EU) and India, as well as achieving active participation and greater influence in the most relevant multilateral forums and international mechanisms.

The actions carried out in Venezuela as part of the military operation to remove the narco-dictator Nicolás Maduro on 3 January 2026 represent the first visible, concrete and uncompromising application of Washington's new hemispheric security doctrine. The United States prioritises the areas of migration, drugs and security, trade and energy resources. However, key elements for the region must be added to this equation, such as the defence of democracy, the energy transition, nearshoring and digital transformation, amongst others. The authors point out that the worst-case scenario for the region would be to remain confined to a fragmented inter-American agenda that only serves the interests of a few and revolves around sanctions, walls and tariffs.

The authors highlight Latin America's full potential to become a 'solution region' in the face of the challenges of a global, green and digital economy. In the face of deglobalisation, the great challenge for Latin American countries is to build broad internal consensus and find their own path to international integration, enabling the region to achieve an increasingly active voice and presence. They conclude by highlighting how the crossroads of our time demands unity and integration, under the strict adherence to and defence of democracy, development and social justice as a virtuous and indissoluble triad.

The *Strategic Outlook 2026* concludes with an analysis by Professor Federico Aznar of populist movements, which hinder the proper functioning of democracies and have a negative impact on alliances between Western countries and multilateral organisations. This study is based on the premise that populism is not strictly an ideology, but rather a political strategy, particularly useful to extremists due to the inherently radical nature of the methodology it advocates for its approaches: a confrontation between the people and the elites. Through this, it undermines the legal and political architecture of democracies and erodes their checks and balances (such as the media or the judiciary).

The author highlights the central role of populist communication strategies in dominating the information agenda and turning it into the social agenda, through the use of disinformation. He also analyses the uncertainty that national populism introduces into the international arena and the emulation it provokes. The spread of the model it advocates hinders global agreements and strains regional organisations. Professor Aznar concludes by pointing out that the rules international society has established cannot prevent these changes, but they can make them more orderly.

Disregarding these norms, as populism does, causes transformations to accelerate and makes the process more ungovernable.

Before acting, it is always necessary to take a step back and understand reality. We hope that this work will serve as a measured and far-sighted contribution from Spain to the reflection on a world undergoing profound transformations. It is always necessary to take a step back and understand the reality in which one operates before acting, but even more so in times of great uncertainty and growing threats. In these new times, the imperative to defend interests and promote democratic values is pressing. Only if we have maps of reality such as those drawn by this publication will it be possible to do so and to navigate the geopolitics of uncertainty with direction and confidence.

Chapter One

Ideology and pragmatism in Trump's National Security Strategy

Fidel Sendagorta

Abstract

The National Security Strategy 2025 seeks to bring together into a single doctrine the various strands of the MAGA ideological currents, whether nationalist, populist, Christian or tech oligarchic. This document aims to mark the end of the liberal order promoted by previous administrations and to design a policy that serves as the external manifestation of the new right-wing revolution represented by MAGA and Trump himself.

Hence, President Trump's nationalism, encapsulated in the slogan 'America First', is ever-present in the Strategy and sets its central line. Based on this principle, Trump's style relies on achieving his objectives through an uninhibited use of power, without concern for shifting his approach from one day to the next.

The priority granted to the Western Hemisphere, which is one of the novelties of this Strategy, is fuelling the debate about the kind of world that will emerge from the ashes of the liberal order. Some believe that Trump feels comfortable in a world dominated by three major superpowers—the United States, China and Russia—each with exclusive spheres of influence. Others, by contrast, believe that his ultimate aim is to strengthen the United States in the Americas, thereby gaining a competitive edge over China, without, however, relinquishing its presence in the Asia-Pacific.

Keywords

Maga, Nationalism, Western hemisphere, Spheres of influence, China.

Kevin Roberts, President of the Heritage Foundation and responsible for 'Project 2025', which has served as the policy blueprint for the second Trump administration, argues that we are in the midst of a 'second American Revolution' (Astor, 2025) A conservative revolution is an oxymoron, and Edmund Burke would be turning in his grave at the sight of those two words together; yet the truth is that the United States is now governed by a new right willing to break things that, up until only a few months ago, seemed untouchable.

President Trump, who has played a decisive role in creating this new brand of conservatism that now dominates the Republican Party and has brought him to power for a second time, is a charismatic leader, but not necessarily an ideological one. His most deeply held beliefs are 'America First' nationalism, an aversion to trade deficits, and the deportation of irregular immigrants. In other respects, however, he is proving to be more pragmatic than doctrinaire. Nevertheless, Trump seeks to maintain the support of the various ideological factions within the MAGA movement and has recruited many of its members to senior positions in his administration. Others are not in government but wield considerable ideological influence through their media platforms and think tanks. Consequently, it may be useful to begin with an analysis of the ideas of the MAGA world and attempt to understand how they influence current US foreign policy.

All these approaches stem from a shared diagnosis: the United States has fallen into a decline, partly as a national phenomenon and partly as a consequence of what is perceived as the exhaustion of Western civilisation, whose symptoms are shared by Europe and North America. As Curtis Yarvin, an agitator of the new right, graphically states, 'this country has lost its place in History' (Rufo and Yarvin, 2023).

At the core of this 'second American Revolution' lies a sense of anxiety stemming from profound demographic changes with deep cultural consequences. Hence, the populist nationalism that prevails in today's conservatism carries an undeniable racial connotation. Indeed, in 1970, non-Hispanic whites accounted for 83% of the population, a figure that today stands at around 53%. This dwindling white majority is set to become a minority by the 2040s, according to demographic projections. Professor Samuel P. Huntington, in his work *Who Are We?* (Huntington, 2004), which addresses the crisis of American identity, argues that this shift in the racial balance, to the detriment of whites, creates the perception of a loss of the centrality of Anglo-Protestant culture, since these three elements were present from the very beginning in the nation's origins. As Huntington notes, contrary to popular belief, the United States is not a country of immigrants, but of settlers. Later immigrants encounter a society created by settlers to which they must adapt. This argument has been used by a figure of the new right such as Charlie Kirk in some of his university engagements before his tragic death in 2025 (Kirk, 2024). Huntington was a liberal Harvard professor who died in 2008, yet it seems clear that contemporary activists of white nationalism have read his works.

The idea among populist nationalists is therefore that, for the United States to remain the United States, it must remain white. The nation's decline is essentially attributed to the erosion of the foundations of national identity. The cause of these changes in the racial balance, which in turn bring about a transformation of the country's cultural identity, is seen as mass immigration encouraged by liberal elites who have lost their sense of patriotism. However, the new right has a long list of grievances against progressives that go beyond the aforementioned dissolution of national identity: the end of a merit-based system through minority quotas; the weakening of the traditional family through policies promoting LGBTI rights and queer theory, which have in turn influenced declining birth rates; the forced secularisation of society to the detriment of Christianity; the embrace of globalisation associated with offshoring, leading to the loss of millions of industrial jobs; and the launching of endless wars in Iraq and Afghanistan that yielded no benefit for the country while costing many lives and a quintillion-dollar drain on the treasury.

The conservative revolution now underway aims to reverse these negative trends and galvanise the country's best energies to overcome this decline and revitalise society, culture and the economy by promoting the greatness of the United States.

However, the coalition of forces that secured Trump's victory first in 2016 and then in 2024 is not homogeneous nor does it always agree on its objectives. Silicon Valley tycoons (popularly known as 'tech oligarchs') disagree with the restrictive visa policies advocated by populists, as these prevents them from accessing the world's best talent. In turn, national populists such as Steve Bannon advocate a gradual and prudent policy on the development of artificial intelligence (AI) to avert the danger of massive job losses among the middle class. Silicon Valley, by contrast, is committed to massive investment in AI to secure an advantage for American companies in competition both amongst themselves and with those in China.

In foreign policy too, there are numerous contradictions among the various ideological factions that make up the MAGA movement, which will be examined in these pages. Trump's leadership has so far managed to find compromises acceptable to both sides and, ultimately, has succeeded in imposing its own judgement even against powerful figures within the movement. The National Security Strategy 2025, published on 5 December, aims to bring together in a single doctrine the different emphases of the MAGA ideological currents, be they nationalist, populist, Christian or tech oligarchic. However, President Trump's nationalism, summed up in the slogan 'America First', is ever-present in the document and sets the central tone. Based on this principle, Trump's style is centred on achieving objectives without being bound by any prior criteria and without hesitation in changing his approach from one day to the next. It is not, therefore, a leadership style based on strategic vision. For this reason, this document is of particular interest in attempting to identify a degree of coherence in the foreign and security policy of Trump's second term.

It is important to stress that this is the Strategy of the second term, as the differences with the equivalent document from the first term are very significant. The National Security Strategy 2017 was coordinated by the then National Security Advisor, H. R. McMaster, with an approach inspired by the realist school of international relations. Its principal novelty was to declare the return of great power competition as the central organising principle of geopolitics. China and Russia were both revisionist powers seeking to reshape the international order in line with their interests, with China emerging as the principal strategic competitor of the United States (Sanger, 2025).

By contrast, the 2025 Strategy seeks to mark the end of the liberal order promoted by previous administrations and to design a policy that serves as the external projection of the revolution of the new right represented by MAGA and by Trump himself (The White House, 2025). Its guiding principles are therefore as follows:

— The defence and promotion of the national interest as the sole guiding principle for US action. Moreover, the national interest is defined restrictively, focusing on priorities and avoiding the expansive approach (which had led previous administrations to overextend themselves globally).

— Other countries are encouraged likewise to pursue their national interests. It is understood that when these come into conflict with those of the United States, the latter will prevail on the basis of superior power. To that end, the United States must unhesitatingly utilise those elements of its power (economic, technological, security) that provide the necessary leverage to resolve any negotiation in its favour. It must also avoid dependencies on value chains that could create vulnerabilities to an adversary (Fishman, 2025).

— Although the world in which this Strategy operates is governed by the law of the strongest, the aim is to avoid at all costs endless conflicts such as those in Afghanistan and Iraq. The document's watchword is peace through strength. When force is used, as in the joint operation with Israel against Iran's nuclear facilities or in the capture of Nicolás Maduro in Caracas, Washington ensures that the conflict remains limited and does not escalate or drag on.

— Sovereignty is a fundamental principle and, therefore, multilateralism cannot under any circumstances take precedence over it. Throughout the document there is explicit hostility towards transnational organisations and, in particular, towards the European Union, as will be seen later.

— It rules out the use of influence to impose democracy on countries with systems different from that of the United States, thus deviating from a long-standing line in US foreign policy, which reached its climax with the neoconservative policy in the Greater Middle East. However, there is room for pressure on like-minded countries (Europe, the Anglosphere and other democratic nations) to uphold fundamental rights and freedoms as currently interpreted in Washington (that is, so as not to curtail the political space of the rising new right).

— Alliances are regarded as an international asset of the United States, but there must be an equitable sharing of the burden. Allies must assume primary responsibility for their regions, must spend more on defence, and must compensate the United States for decades of trade surpluses by investing there. In fact, two of these three conditions have already been agreed with the allies. At the 2025 NATO summit in The Hague, it was decided to increase defence spending to 5% (3.5% on military expenditure and 1.5% on security infrastructure). As for massive investments in the United States, these were included in the trade agreements signed in 2025 with the EU, Japan and South Korea, amongst others. It remains to be seen how the allies' primary responsibility for the security of their regions will be implemented. The National Defence Strategy and the National Posture Review, which the Pentagon traditionally publishes following the National Security Strategy, will provide the key insights on this point, including the redeployment of US military units.

— Mass immigration is no longer merely a social or political problem but has risen to the status of a major national security challenge. Hence, border control and the strict enforcement of immigration laws are no longer simply a matter of public order but the primary political concern. In this regard, Latin America's rise to the top of the Strategy's priorities can be interpreted as an expansion of the United States' security perimeter to address, with these countries (with or without their cooperation), internal issues such as immigration and drug trafficking (Landgraf, 2025).

— The Strategy also includes as priorities certain economic objectives to be pursued 'in the interests of the American worker', in a nod to the more populist sectors of MAGA, such as those represented by Steve Bannon, as opposed to the 'plutocrats' of Silicon Valley who, in Bannon's words, are only interested in money and are not patriots. There is another reference that will have pleased this sector, when it states that the search for 'global talent' cannot be at the expense of American workers (Douthat, 2025).

— In any case, the economic priorities are as follows:

- The reindustrialisation of the country, a leitmotif of Trump and MAGA, who blamed globalist liberals for the loss of industrial jobs due to offshoring. In this case, an additional security concern is added: avoiding US dependence on current or potential adversaries with regard to critical products.

- Economic security, which includes both the promotion of balanced and fair trade and ensuring access to supply chains for critical materials by 'confronting predatory practices'. This reference is directed at China (without explicitly naming it) and recurs throughout the Strategy. This emphasis stems from the trauma suffered by the administration and by the President himself, due to the restrictions imposed by China on the United States (and also on Europe) regarding the export of rare earths and the magnets produced from them, which are essential for the manufacture of electric cars and other high-tech equipment, including missiles. This strong-arm tactic was taken by Beijing in retaliation for the 140% increase in US tariffs on Chinese goods in February 2025. Finally, in October of that same year, both sides reached a provisional agreement whereby the United States cut tariffs and China eased restrictions on the export of rare earths. This episode was generally interpreted as a Chinese victory (Doshi, 2025) and hence the obsession with which the Strategy addresses this issue, as an episode that must not be repeated in the future.

- Revitalising the defence industrial base. One of the lessons of the war in Ukraine has been the speed at which stocks of missiles and ammunition were depleted, and the difficulties faced by the United States and Europe in replenishing them due to a lack of industrial capacity. The AUKUS agreement between the United States, the United Kingdom and Australia—to supply the latter with nuclear submarines—also set alarm bells ringing, due to the inability of US shipyards to build their own submarine programme on schedule and, furthermore, to deliver those promised to Australia.
- Restoring dominance in the energy sector. This point is a true MAGA statement of principles, as it includes only oil, gas, coal and nuclear energy and makes no mention of renewables. It also rejects the ideology of ‘climate change’ and ‘zero emissions’. This position is based on ideological principles dear to Trump, but some analysts, such as Simon Nixon, add that the United States had fallen behind in the technological race with China in renewable energy, and rather than attempting to regain the lost advantage, Trump has preferred to focus on traditional energy sources, which the country has in abundance and at low prices. This provides a productivity advantage, allows for increased production for the data centres required for AI, and enables exports to friendly nations, preventing them from becoming dependent on others (Nixon, 2025).
- Preserving and enhancing dominance in the financial sector by maintaining the role of the dollar as the world’s reserve currency. At their 2023 summit in South Africa, the BRICS

countries expressed their intention to reduce dependence on the dollar, which is used in 80% of global trade transactions. To this end, they proposed creating a new currency to minimise the risks of their exposure to the US dollar. Trump then threatened (although he had not yet been elected president) to impose punitive tariffs should this initiative go ahead. However, no progress has been made in this area since then.

Having set out its objectives and principles, the Strategy examines different regions in order of priority according to United States vital interests:

1. The Western Hemisphere. It may come as a surprise that the United States' immediate neighbourhood is receiving the strategic attention it has not had for over a century. A reason for this focus is that, for this administration, vital interests are those of a domestic nature (an end to mass immigration and drug trafficking) and those which, therefore, primarily affect citizens. The Americas are treated here as an extension of the nation, with the aim of tackling the problems afflicting the country, but which have their origins partly in the southern neighbourhood. One example that received significant media attention at the start of Trump's term was based on his good relationship with the Salvadoran president, Nayib Bukele, and enabled the deportation to high-security prisons in El Salvador of a number of drug traffickers and gang members residing in the United States. Equally swift have been US attacks on drug traffickers' boats coming from Venezuela. But the prime example of this new hemispheric policy has been the military operation to capture Nicolás Maduro and his wife and transfer them to New York to stand trial for drug trafficking. Given the opposition of the MAGA grassroots to repeating the mistakes of the 'endless wars', this operation was based on three premises: that there would be no US casualties; that there would be no cost to the US Treasury (hence the insistence on oil revenues); and that there would be no intention of engaging in a democratic reconstruction effort, such as those that had failed in Iraq and Afghanistan. These objectives have been met to date, albeit at the cost of creating no small number of contradictions due to the regime's leaders remaining in charge of the government. The militarisation of US policy in the region is also intended to have an intimidating effect on

those countries whose policies run counter to Washington's interests. But the aim of controlling Venezuela and its oil by decapitating the regime also has a geopolitical purpose: to begin curbing China's growing presence and influence in the region. Venezuela, with a debt to China of sixty billion dollars, backed by oil, is a good place for the US administration to start. Although there may be others on the list, such as Cuba itself–the home country of Secretary of State Marco Rubio, whose hand many analysts have detected in the drafting of this chapter of the document.

In reality, beyond the domestic reasons for making the Western Hemisphere the main priority of this Strategy, the exclusion of China from what is considered the United States' backyard constitutes a strategic objective. 'The United States must be pre-eminent in the Hemisphere', the document states explicitly, dubbing this policy 'Trump's corollary to the Monroe Doctrine'. On this occasion, the aim is not to expel the Europeans, as in the 19th century, but China (without naming it). The purpose is to prevent these 'extra-hemispheric competitors' from positioning military forces on the subcontinent or acquiring critical infrastructure and strategic assets.

To this end, the Strategy proposes to engage regional champions, both in terms of like-minded countries such as Argentina—to which Washington granted a USD 20 billion swap loan in 2025— and among less closely aligned states with which shared interests nonetheless exist (as in the case of Mexico and Brazil). The objective, in addition to preventing China from increasing its influence in the region, is to jointly develop strategic resources (such as critical minerals) with which Latin America is richly endowed.

This will not be an easy task for Washington. It is true that some countries in the region, such as Brazil and Mexico, resent China imposing a trade relationship on them in which the import of raw materials and agri-food products and the export of manufactured goods prevail, thereby delaying their industrialisation plans. However, most states on the subcontinent have opted for a strategy of trade and investment diversification that involves having China and Europe as partners, in order not to depend exclusively on the United States. In this regard, it does not seem feasible to convince Peru to abandon the Chancay mega-port, built and operated by the Chinese company COSCO, which is a strategic project for the country. Nor will it be easy to persuade Chile to abandon the alliance between the Chilean state-owned company Codelco and the Chinese firm SQM to mine and export lithium from the Salar de Atacama, given that China accounts for 70% of Chilean lithium exports. These are just two examples illustrating the difficulties facing this new US policy. A different matter is a country like Panama, whose canal remained under US sovereignty until the Torrijos-Carter Treaty. In this case, pressure from Washington has relatively easily succeeded in persuading the Hong Kong-based company CK Hutchison to agree to sell all the canal's port facilities to a consortium led by Blackrock.

2. Asia is the second priority region for the United States, although it has already become clear that concern over China's growing penetration in Latin America and the aim of resisting it is one of the fundamental reasons why the Western Hemisphere has become the top priority.
   The chapter begins by describing the region's economic importance (50% of global GDP in purchasing power parity terms) and China's rise to a position almost on a par with the United States. The tariffs imposed by Trump in 2017 (and subsequently maintained by the Biden administration) led to a diversification of Chinese trade towards emerging markets, from some of which China continued to export to the United States. Even so, Chinese exports to the United States fell from 4% of its GDP when Trump began his first term to the current 2%. The US objective is for economic relations with China to be governed by reciprocity and fairness, with mutually balanced trade focused on non-sensitive sectors. This last sentence points to the disconnect between the two economies in cutting-edge technologies. The truth is that China, with its dual-circulation economy, also aims to achieve maximum technological autonomy and not to depend on the United States in critical sectors where vulnerabilities could arise.
   To protect its economy, the United States intends to put an end to predatory practices, state subsidies and industrial strategies (it does not explicitly state whose, but given the context it can only refer to China); the theft of intellectual property; preventing US access to critical materials and minerals (once again, resentment is evident at the realisation of existing dependence on China in this field); and the export

of fentanyl precursors causing the opioid crisis in the United States.

To this end, the United States must work together with its allies and partners to prevent these economic practices. In this context, reference is made to trade relations with India and its contribution to security in the Indo-Pacific, including through the Quad (the United States, Japan, Australia and India).

The United States expects these coalitions of countries—to which others are added on a case-by-case basis, such as Canada, Mexico, Europe, and Korea—also to serve in persuading China that it must focus its energies on its domestic market, since neither Southeast Asia, nor Latin America, nor the Middle East will be able to absorb the excess capacity that China is currently exporting. The wealthier allies, including Europe, Japan and Korea, are expected to contribute funding to build physical and digital infrastructure in the countries of the Global South. Without naming it, the Strategy is referring to the 'Chinese New Silk Road' and the need not to leave the field open to China and to compete with it in third countries. Specifically, the United States is inviting its European and Asian allies to strengthen their common positions in Latin America and Africa (in this case, with regard to critical minerals).

Once again, without explicitly mentioning China, but in the context of competition between the two superpowers, the Strategy emphasises the need to redouble efforts in research and development to maintain and expand the US lead in military and dual-use technologies, as well as in those that will determine future military power, such as AI, quantum computing and autonomous systems. In the long term, the document states, 'maintaining economic and technological pre-eminence is the best way to prevent a large-scale conflict'.

In this context, the Strategy refers to the attention given to Taiwan, not only because of its semiconductor capacity but also because it provides access to the second island chain (Guam, Yap, Palau). Hence, deterring a conflict over Taiwan is a priority. At the same time, the traditional declaratory line on maintaining the *status quo* for the island is upheld.

These brief statements will undoubtedly have had a reassuring effect not only in Taiwan itself, but also on like-minded countries in the region such as Japan, South Korea and

Australia. Despite being a strategy for a revolutionary policy, there has been no change in position regarding Taiwan. This is notable given that, since Trump's inauguration, several gestures had appeared to suggest that the United States might abandon Taiwan as part of a major trade agreement with China. Indeed, a few months ago, during his Senate confirmation, Elbridge Colby, the Pentagon's number three and now responsible for drafting the National Defence Strategy (which traditionally follows the National Security Strategy), stated that Taiwan was not an existential interest for the United States (Moriyasu, 2025). It was also significant that Washington did not authorise a stopover in New York for Taiwanese President Lai Ching-te in the summer of 2025. And by November 2025, a crisis had erupted between Beijing and Tokyo when the new Prime Minister, Sanae Takaichi, stated that an attack on Taiwan would be regarded as an existential threat, allowing Japan to deploy its Self-Defence Forces to support the island. In addition to warnings issued by a Chinese official threatening to 'cut the Prime Minister's throat', Beijing implemented various retaliatory measures, including a boycott of Chinese tourism to Japan. According to leaks, during the conversation between Takaichi and Trump, the latter reportedly advised her to exercise caution, causing considerable frustration within the Japanese government over Washington's failure to provide a firmer response to its ally. Added to this is the report published by the think tank Defense Priorities, authored by two experts very close to the current administration (Kavanagh and Caldwell, 2025), who argue that the United States should renounce defending Taiwan in the event of a Chinese attack, and ensure that Japan and the Philippines remain outside China's sphere of influence.

All these signs appeared to confirm the supposed vision of Trump of an international order based on a concert of strongmen—Putin, Xi Jinping, and himself—leading powers endowed with exclusive spheres of influence (Goddard, 2025).

These concerns have not been reflected in the text. On the contrary, in addition to the mention of Taiwan, it is stated that the United States will have the necessary military capability to prevent an attack on the first island chain (Japan, Taiwan, the Philippines), although allies in the region are required to spend more on defence and make a greater effort to assume their responsibility for regional security.

The document also mentions the objective of maintaining freedom of navigation in the South China Sea, through which some of the world's most important trade routes pass.

Critics of the Strategy, such as New York Times columnist David Sanger, have pointed out that, unlike the 2017 Strategy issued during Trump's first term, this document focuses more on economic competition with China, sidelining strategic issues such as China's nuclear expansion in recent years and the repeated cyberattacks on government agencies and businesses. Nor is North Korea mentioned even once, as if the ballistic and nuclear threat posed by that country had vanished.

Secretary of War Pete Hegseth has explained that the US approach to China is aimed not at dominance, but at a balance of power. To this end, the United States wants China to take note of US military strength and to respect American interests in the Indo-Pacific, whilst avoiding unnecessary confrontations. In return, the United States respects the rearmament on a historic scale that China is undertaking (Chávez, 2025).

In short, this Strategy does not fundamentally alter the security policy pursued towards China in recent years. It could be said that the main objectives regarding its major competitor are economic and that Trump has sought to avoid hostile language towards Beijing as he has a visit to China scheduled for April, during which he hopes to secure a major trade deal.

3. <u>Europe</u>. The Strategy addresses three major issues in relations with Europe, but the first has attracted the most public attention because it describes a cultural factor that had never been present in previous documents devoted to national security: the decline of European civilisation. This decline is attributed to a combination of mutually reinforcing causes: birth rates in freefall accompanied by the accelerated ageing of the population; a loss of identity caused by mass immigration of a cultural profile not always compatible with free and open societies; and European Union activities that stifle growth through excessive regulation and erode political freedom and sovereignty. The result is a loss of confidence in Europe itself and a weakness which, within twenty years, could mean that many of the continent's countries no longer have European majorities and, therefore, no longer be reliable allies within NATO, presumably because their values will

no longer be predominantly Western but will be tinged with various shades of Islamism which, in their most extreme forms, border on jihadist terrorism.
The Strategy thus implicitly incorporates the notion of *civilisational security.* Its origins lie in Vice President J. D. Vance's speech at the Munich Security Conference in February 2025, in which he stated that the main threat to Europe stemmed from internal factors, such as the erosion of democratic norms through censorship and the suppression of dissent. The Strategy elaborates in greater depth on this assessment of a Europe in decline that poses a danger to the United States. These ideas stem largely from Christian authors, who do not necessarily subscribe to the New Right's agenda, but who have had and continue to have considerable influence in conservative academic and intellectual circles. The best known is George Weigel, who in his book *The Cube and the Cathedral* (Weigel, 2005) addressed this issue and asked why it should matter to the United States that Europe had fallen into a trajectory he perceives as self-destructive. His fundamental thesis is that 'a United States indifferent to the fate of Europe is a United States indifferent to its own roots'. In other words, the United States must not make the same mistake as Europe by succumbing to historical amnesia regarding its origins as a civilisation, starting with Christianity. But Weigel also mentions the threat posed to the United States by the consequences of a demographic vacuum that will be filled by a radicalised Islam convinced that its revenge against European civilisation is imminent. Weigel frequently quotes in his work the Jewish professor Joseph Weiler, who was highly critical of the European Union's attempt, in its *non nata* draft Constitution, to base European identity exclusively on the Enlightenment, whilst overlooking what he considered to be the indispensable contribution of Christianity to the creation of Western civilisation. Joseph Ratzinger, too, both before and after becoming Pope Benedict XVI, had devoted considerable attention to this issue of European decline, particularly its demographic aspects, which he associates with a lack of will for the future. Ratzinger said that:

> 'It is necessary to draw a comparison with the Roman Empire in decline: it continued to function as a grandiose historical framework, but in fact they were living off those

> who were going to dissolve it, because it had run out of vital energy' (Starcevic, 2025).

In short, as Weigel put it, 'the European problem is also ours'. Whether out of fear that the United States might follow the same path as Europe, or out of the realisation that the weakness of the European wing of Western civilisation would ultimately undermine its American wing as well. (Sendagorta, 2007).

It is true that this contribution of so-called Christian nationalism within MAGA, very much present in some of its leading figures, such as Vice President Vance himself, Charlie Kirk, Jonathan Keeperman and Steve Bannon, has been criticised in part by the current Pope Leo XVII, who expressed his unease at the division the current administration was creating between Europe and the United States.

In conclusion, the document calls for 'cultivating resistance' to these negative trends and, in this regard, views with optimism the growing influence of patriotic parties that could promote a revitalisation of the true European spirit.

The United States is therefore committed to a Europe of nations as opposed to a European Union which is criticised for stifling economic regulation and a migration policy that contributes to the dissolution of national identities and weakens political freedoms and sovereignty.

Trump's hostility towards the EU has always been evident, and he has at times remarked that the organisation was created 'to harm' the United States. But now this personal animosity has been enshrined in a full-fledged doctrine, the implementation of which will become apparent in the coming months and years. In fact, the publication of the Strategy has coincided with the European Commission imposing a fine of €142 million on X (formerly Twitter) for issues relating to a lack of transparency. Elon Musk's reaction was swift, and he created a hashtag called #AbolishtheEU. Vice President Vance and Secretary of State Rubio immediately backed Musk with harsh criticism of the EU.

It is true that the document expresses support for a Europe that is 'strategically and culturally vital to the United States', but it does not refer to a united Europe, but rather to the nations that compose it. However, with this argument favouring the nationalist parties of the new right, contradictions immediately come to the fore. Indeed, these parties may identify with this document in its diagnosis of decline, in the need to end mass immigration and to combat *wokeness*, which, in their view, has hijacked European institutions. However, the MAGA slogan is 'America First 'and nationalist parties in Europe advocate 'Germany First', 'France First' and so on. The national interests of European states are bound to clash with those of the Americans on more than a few issues and, therefore, in this sphere outside cultural disputes, the affinities between nationalists on both sides of the Atlantic come to an end. This has been evident in Le Pen's criticism of the US operation in Venezuela for undermining the principle of national sovereignty. And the same would hold true if Trump were to achieve his aim of taking over Greenland.

In any case, the vision of Europe adopted by this Strategy has a clear mirror effect: 'a projection across the Atlantic of US domestic politics, with its culture wars and clash of identities, a family affair' (Areilza, 2025)

Furthermore, the section devoted to the war in Ukraine begins by reiterating that Europe's loss of self-confidence is the reason why European governments feel weak in the face of Russia and, consequently, regard it as an existential threat. Hence, they are unable to support the inevitable concessions that Kyiv will have to make to end the conflict, despite the fact that the desire for peace is widespread among European populations.

For this reason, negotiating a swift end to hostilities is a key interest for the United States, the Strategy states, in order to avoid escalation, restore strategic stability with Russia and enable the reconstruction of Ukraine.

Some commentators criticise this approach, in which Russia is not condemned for its aggression and, furthermore, the United States presents itself as a neutral negotiator between Russia and Europe. In fact, the text is less biased towards Russia than the positions held by this administration since the beginning of its term. The tense meeting between Trump and Zelensky at the White House in February 2025 marked a crisis point in the bilateral and personal relationship, as Trump's approach—that the weaker party was the one that had to make the necessary concessions, 'because their cards are bad'—was laid bare in all its harshness. In contrast, the Trump-Putin summit held in Alaska a few months later highlighted the closeness between the two presidents and the American understanding of Russian positions.

Beyond this mediating stance, cultural affinities between MAGA and Russia have been present since before Trump's first term and have undoubtedly influenced Republican perceptions of the Russia–Ukraine war, further widening the gap between Europe and the United States. Indeed, for the MAGA world, starting with its media leaders such as Tucker Carlson and Steve Bannon, Putin's Russia—white, Christian, with traditional values and based on the authority of a strong leader—was more compatible with their own views than a weak and *woke* Europe (Hayward, 2025).

In addition to these cultural factors, Trump is convinced that Russia, with its vast energy and mineral resources, would be a more attractive economic partner than Ukraine. He has not denied—indeed, he has suggested—that his relationship with Russia also has strategic dimensions linked to the American interest in distancing Russia as much as possible from China, even though the partnership between those two powers is currently closer than ever.

It is noteworthy that the Kremlin spokesman, Dmitry Peskov, publicly praised the Strategy, stating that 'its approaches correspond in many ways to Russia's vision' (Faulconbridge and Kelly, 2025).

To conclude this section, it is worth highlighting the contradiction that this Strategy criticises Europe for its weakness whilst at the same time seeking to contribute to it by undermining the process of European integration. Indeed, the United States wishes to secure European cooperation in certain sectors related to its rivalry with China, such as the fight against unfair trade practices; cooperation in Latin America and Africa to ensure the supply of critical minerals; and controls on the export of sensitive dual-use technologies. The EU is active in all these fields, in some cases with its own powers and in others with the capacity to coordinate the actions of member states. In this regard, it can be concluded that ideological considerations have prevailed in this document over the defence of shared interests between Europe and the United States.

4. The Middle East

In contrast to the highly ideological section on Europe, the Middle East section is clearly pragmatic. Indeed, it seeks to distinguish itself from the neo-conservatives' ambition within the Bush administration to impose democracy and nation-building by force of arms. However, when it comes to defining national interests in the region, it reflects a fundamental shift: the United States no longer depends on oil and gas from the Gulf, as it now has substantial domestic production of its own. Its current economic interest is therefore focused on promoting technological investment in partnership with countries possessing capital derived from hydrocarbons.

As for the conflicts that have periodically destabilised the region, the document praises the agreement reached by Trump to end the war between Israel and Hamas and the military operation launched against Iran in collaboration with Israel to weaken its nuclear programme as much as possible. Overall, an optimistic view of the region is evident, in which these diplomatic and military successes, combined with collaboration with Israel and Arab partners to eventually expand the scope of the Abraham Accords, can lead to progress towards greater stability. In this context, the Strategy mentions, for the first time, the fight against terrorism and Islamist radicalisation, in cooperation with local countries, but without the sense of urgency that this issue has had in the recent past as a national security priority.

However, this essentially pragmatic approach to the Middle East must not obscure the ideologically charged undercurrent that is stirring the waters of the MAGA world and threatening to create deep divisions within the movement. This concerns the highly contentious debate surrounding relations with Israel. During the Gaza war, it began to become apparent from opinion polls that those opposed to Israel were not only Democrats, but also young Republicans. In fact, the rift within this party is generational, with the dividing line falling around the age of forty: below this age, there are predominantly anti-Israel positions, whilst above it, the opposite is true.

However, the debate heated up when Tucker Carlson interviewed the ultra-conservative activist Nick Fuentes, whom his critics accuse of being pro-Nazi and anti-Semitic (Carlson, 2025). During the conversation, Fuentes said he was guided by the 'America First' principle, which did not seem compatible with 'Israel First'. When Carlson began to examine on his television programme the purposes to which the substantial American aid to Israel was being put—amounting to USD 3.8 billion annually, excluding specific military assistance for the war — the responses he received were that it was not advisable to open a front against Israel when its security was under threat. An influential YouTuber of the new right, Ben Shapiro, even threatened to destroy him politically if he continued down that path. Fuentes told Carlson (who did not refute his arguments, but seemed to identify with them) that he had read Walt and Mearsheimer's classic book on the pro-Israel lobby and that it had opened his eyes to its power to steer Washington in directions that suited Israel, but not necessarily the United States (Mearsheimer and Walt, 2007). In fact, in the days leading up to the air strike on Iran's nuclear facilities by Israel and the United States, Tucker Carlson, Steve Bannon and other MAGA leaders spoke out against an operation that could once again embroil the United States in one of those 'never-ending wars' they so detested—this time on behalf of Israel's particular interests. This debate subsided due to the lack of escalation with Iran, but discussions about the divergence of interests between the United States and Israel in foreign policy became intertwined on social media with conspiracy theories targeting Israel over the murder of Charlie Kirk and the Epstein case. These divisions within the conservative camp regarding Israel, with young people taking a stand against it, undoubtedly signal a loss of political support for Israel in Washington, which could influence US policy in the Middle East in the medium term.

The following provisional conclusions can be drawn:

1. The coalition supporting Trump is not united, and contradictions are beginning to emerge between the various groups. In both the National Security Strategy and in practice, the so-called technocratic oligarchs prevail, allied with Trump in his aim of making superiority in artificial intelligence the principal asset of the United States in maintaining its economic and military pre-eminence over China in the coming years and decades. The more populist factions succeed primarily in imposing restrictions on immigration.

2. Nationalism is the adhesive that binds the movement together and explains most positions in foreign and economic policy. However, its stark pursuit of national economic interest, to the exclusion of others, erodes trust with allies and partners and hinders the cooperation that the United States seeks to organise against China's unfair trade practices and its use of rare earths as a geoeconomic weapon.

3. The priority granted to the Western Hemisphere is in reality an extension of the United States’ security perimeter to encompass all countries in the region, in order to address more effectively issues such as immigration and drug trafficking—matters of domestic concern that are of greater importance to the MAGA base than foreign policy issues.
4. Despite the tendency to turn domestic priorities into foreign policy, China appears to be the United States’ main concern. In the Strategy, the aim is to mark out territory, literally in the case of Latin America and, above all, with regard to its economic model, which it is intended to modify through positive and negative incentives. In any case, it is clear that Trump wishes to leave room for a major economic deal with China and has not wanted the Strategy to be excessively aggressive towards his rival.
5. Europe emerges as the principal casualty of Trump’s foreign policy and, consequently, of the Strategy. MAGA—particularly its nationalist and Christian components—sees itself as a movement of national revitalisation aimed at overcoming a decline attributed to cultural factors and loss of identity. MAGA is not concerned with NATO or Russian aggression, but rather with the rebirth of Western civilisation and, consequently, of Europe. Its re-Christianisation, the restoration of the vigour of sovereign nations, and preventing immigration from creating a Muslim future for Europe are the priorities of the new American conservatives and their European counterparts.
6. The consideration of the Western Hemisphere as the Strategy’s main priority, and the corroboration of this principle in the military operation in Venezuela and in Trump’s intention to incorporate Greenland into US territory, have influenced analyses that attribute to Washington a vision of a world divided into exclusive spheres of influence corresponding to the three major powers. However, the only thing the Strategy and its practical applications in Venezuela and Greenland demonstrate is that this administration regards the Western Hemisphere as its exclusive sphere. There is currently no recognition of a similar sphere for China that includes Taiwan. There is greater ambiguity regarding the possibility of recognising an exclusive zone for Russia with respect to Ukraine, an issue left to the balance of power on the ground.

Bibliography

Areilza, José M. de. (2025). A family affair [online]. *ABC.* [Accessed: 2025]. Available at: https://www.abc.es/internacional/jose-m-de-areilza-asunto-familia-20251213201712-nt.html

Astor, M. (2025). Heritage Foundation Head Refers to "Second American Revolution" [online]. *New York Times*. [Accessed: 2025]. Available at: https://www.nytimes.com/2024/07/03/us/politics/heritage-foundation-2025-policy-america.html

Carlson, T. (2025). Tucker Carlson interviews Nick Fuentes [online]. YouTube. [Accessed: 2025]. Available at: https://www.youtube.com/watch?v=efBB0D4tf1Y

Doshi, R. (2025). The moment China proved it was America's equal [online]. *New York Times.* [Accessed: 2025]. Available at: https://www.nytimes.com/2025/11/19/opinion/trump-china-xi-trade.html

Douthat, R. (2025). Steve Bannon on "Broligarchs" vs. Populism [online]. *New York Times*. [Accessed: 2025]. Available at: https://www.nytimes.com/2025/04/07/opinion/ross-douthat-steve-bannon.html

Goddard, S. E. (2025). The Rise and Fall of Great-Power Competition [online]. *Foreign Affairs.* [Accessed: 2025]. Available at: https://www.foreignaffairs.com/united-states/trump-rise-and-fall-great-power-competition

Faulconbridge, G. and Kelly, L. (2025). Kremlin says new US security strategy accords largely with Russia's view [online]. *Reuters.* [Accessed: 2025]. Available at: https://www.reuters.com/world/china/kremlin-says-new-us-security-strategy-accords-largely-with-russias-view-2025-12-07/

Fishman, E. (2025). *Chokepoints. American Power in the age of economic warfare.* Penguin Random House.

Friedman, T. (2025). Trump Isn't Interested in Fighting a New Cold War. He Wants a New Civilizational War [online]. *The New York Times*. [Accessed: 2025]. Available at: https://www.nytimes.com/2025/12/11/opinion/trump-europe-security-strategy.html

Hayward, F. (2025). The godfather of the MAGA right. Steve Bannon on a US-Russia alliance, kinship with Blue Labour, and his war on modernity [online]. *The New Statesman.* [Accessed: 2025]. Available at: https://www.newstatesman.

com/international-politics/2025/02/steve-bannon-interview-godfather-of-maga-right

Huntington, S. P. (2004). *Who are we? The challenges to American National Identity.* Simon & Schuster.

Kavanagh, J. and Caldwell, D. (2025). Aligning Global Military Posture with U.S. Interests [online]. *Defense Priorities*. [Accessed: 2025]. Available at: https://www.defensepriorities.org/wp-content/uploads/2025/07/Aligning_global_military_posture_with_US_interests.pdf

Kirk, C. (2024). America is not a country of immigrants [online]. YouTube. [Accessed: 2025]. Available at: https://www.youtube.com/shorts/_b_L_mQcSV4

Landgraf, R. (2025). Ten jolting Takeaways from Trump's new National Security Strategy [online]. *War on the Rocks*. [Accessed: 2025]. Available at: https://warontherocks.com/2025/12/ten-jolting-takeaways-from-trumps-new-national-security-strategy/?utm_source=substack&utm_medium=email

Mearsheimer, J. J. and Walt, S. (2007). *The Israeli Lobby and US Foreign Policy*. M. Astral, Strauss and Giroux.

Moriyasu, K. (2025). Taiwan should spend 10% of GDP on defence, says Pentagon No. 3 Colby [online]. *Asia Nikkei.* [Accessed: 2025]. Available at: https://asia.nikkei.com/spotlight/trump-administration/taiwan-should-spend-10-of-gdp-on-defense-pentagon-no.-3-pick-colby-says?utm_campaign=GL_indo_pacific&utm_medium=email&utm_source=NA_newsletter&utm_content=article_link

Nixon, S. (2025). Loss of Faith [online]. *Wealth of Nations.* [Accessed: 2025]. Available at: https://open.substack.com/pub/nixons/p/loss-of-faith?utm_campaign=post&utm_medium=email

Ratzinger, J. (2004). Joseph Ratzinger, "Spiritual Foundations of Europe" [online]. *Zenit.* [Accessed: 2025]. Available at: https://es.zenit.org/2005/05/27/joseph-ratzinger-fundamentos-espirituales-de-europa-2/

Remarks by Secretary of War Pete Hegseth at the Reagan National Defense Forum (As Delivered). 6 December 2025. U.S. Department of War Available at: https://www.war.gov/News/Speeches/Speech/Article/4354431/remarks-by-secretary-of-war-pete-hegseth-at-the-reagan-national-defense-forum-a/

Rufo, C. and Yarvin, C. (2023). Face Off: Christopher Rufo vs Curtis Yarvin [online]. *IM-1776*. [Accessed: 2025]. Available at: https://im1776.com/2024/04/11/rufo-vs-yarvin/

Sanger, D. E. (2025). "Superpower's competition: the missing chapter in Trump's security strategy" [online]*. New York Times.* [Accessed: 2025]. Available at: https://www.nytimes.com/2025/12/07/us/politics/trump-security-strategy-superpowers.html

Sendagorta, F. (2007). *Europe between two lights: Decline or resurgence?* Biblioteca Nueva.

Starcevic, S. (2025). Pope urges Trump not to "break apart" US-Europe relationship [online]. *Politico.* [Accessed: 2025]. Available at: https://www.politico.eu/article/pope-leo-urges-us-donald-trump-not-break-apart-europe-relationship/

The White House. (2025). *National Security Strategy of the United States of America* [online]. Washington, The White House. [Accessed: 2025]. Available at: https://www.whitehouse.gov/wp-content/uploads/2025/12/2025-National-Security-Strategy.pdf

Weigel, G. (2005). *Politics Without God: Europe, America, the Cube and the Cathedral*. Ediciones Cristiandad.

Chapter Two

Power, geopolitics, sovereignty and technology

José Ignacio Torreblanca

Abstract

This text examines the return of technology as a structural variable of international power. It argues that, just as in previous revolutions—the agricultural, industrial and digital ones—contemporary technological innovations are reshaping the economy, state organisation and the global order. However, it shows that the current technological revolution has distinctive features: rapid and global diffusion, the consolidation of the digital sphere as a domain of conflict, and the emergence of private companies as providers of infrastructures that are essential to sovereignty and security.

The competition between the US and China, the text argues, is driving dynamics of securitisation, selective decoupling and fragmentation into technological blocs, with direct consequences for standards, data, supply chains and alliances. Finally, the text examines the European Union's vulnerable position: strong in regulatory capacity, yet dependent on and exposed to the United States and China for access to critical technologies. On the basis of this diagnosis, it calls for the construction of European digital sovereignty as a prerequisite for preserving the EU's strategic autonomy, its democratic and values-based model, and its capacity for political and strategic decision-making.

Keywords

Digital sovereignty, Geopolitics of technology, Technological coercion, Artificial intelligence, European digital regulation.

1 The return of history

At present, the major powers, fully aware that access to, control of and mastery of critical technologies are indispensable requirements for their strategic survival, have entered an increasingly intense competition to secure their digital and technological sovereignty. This rivalry is not limited to the economic sphere, but encompasses military, political, cultural and regulatory dimensions. Technology has thus become a structural factor in power and international rivalry, on a par with territory, population, or natural resources.

This phenomenon is not new. Throughout history, major technological revolutions have acted as precursors to major systemic changes, triggering profound economic, social and political transformations both within societies and in the configuration of the international system and the relations between its units. These changes have often led to major conflicts, both within and between states.

Around seven thousand years ago, the transition from subsistence economies to forms of intensive agriculture, associated with the domestication of species such as wheat and the development of irrigation technologies, brought about a radical change in social organisation. The generation of agricultural surpluses enabled the specialisation of labour and laid the foundations for the emergence of the first permanent political institutions: administrative bureaucracies, tax systems, professional armies and religious hierarchies.

These advances fostered the codification of law, the formal organisation of knowledge and the expansion of long-distance trade. At the same time, the need to manage large populations and territories favoured a concentration of political power in specific geographical centres, giving rise to complex state structures. Thus emerged the so-called ‘hydraulic empires’, whose power rested on the control of water and agricultural resources, as well as on the ability to finance and arm large armies. These entities projected their influence beyond their borders, coming into conflict with similar political entities.

Closer to our own time, the First Industrial Revolution (1760–1840), driven by the steam engine, the mechanisation of the textile industry and the intensive use of coal, also had profound political and geopolitical consequences. On the one hand, it marked the decisive shift from an agrarian to an industrial economy. On the other, it eroded the political, social and economic structures of the *Ancien Régime*, facilitating the transition towards economic and political liberalism. Industrialisation accelerated urbanisation and gave rise to new social classes—the industrial bourgeoisie and the urban proletariat—whose demands profoundly transformed the structures of political representation.

These changes triggered political revolutions—the American (1776–1789) and the French (1789–1808)—which crystallised in new forms of state organisation that challenged the traditional European monarchical order and profoundly altered the international order prevailing at that time. The clash between these new regimes and the absolute monarchies led to a prolonged period of armed conflict that culminated in the Congress of Vienna (1814) and the creation of a new continental balance of power.

Similarly, the Second Industrial Revolution (1860–1930), based on electricity, the railway, the telegraph and steamships, greatly amplified the states' capacity to project power, both domestically and internationally. These technologies drastically reduced transport and communication costs, integrating national markets and expanding global trade on an unprecedented scale.

The geopolitical impact of Western technological superiority was a decisive factor, as it enabled the domination of vast territories at a relatively low cost. Just as Spanish expansion in the Americas had relied on advances in navigation, metallurgy and the use of the horse, the conquest of Africa in the 19th century and the great era of colonialism that followed would have been unthinkable without the technological trident formed by the steamship, the machine gun and quinine (Headrick, 1979). Technology not only conferred military advantages but also gave rise to a system of international relations based on the creation of large colonial empires and the rivalries between them. Although the European empires succeeded in dominating Asia and Africa—and the United States, in the light of the Monroe Doctrine revived today, the American continent—the clash between the European empires led to the First World War and the beginning of a long process of European decline.

In Asia, the cases of China and Japan clearly illustrate the consequences of technological backwardness. During the 19th century, the Qing Empire's inability to adopt the key technologies of the Industrial Revolution led to a series of military defeats at the hands of Western powers, culminating in the Opium Wars and the so-called ‘Century of Humiliation’ This historical experience has left a lasting mark on Chinese strategic culture. The central importance that Chinese leaders now assign to technology as a guarantor of national sovereignty and international status cannot be understood without this historical background. Their determined effort not to fall behind in fields such as artificial intelligence, advanced computing, or semiconductors responds as much to economic calculations as to geopolitical and survival logic.

Similarly, Japan, which during the Tokugawa period had maintained a policy of international isolation, suffered a major technological shock with profound political, economic and cultural consequences in 1853 following the arrival of the American ‘black ships’—as Commodore Perry’s steam-powered vessels were known—and was also forced to sign a series of completely asymmetrical treaties that compelled it to open up to international trade.

The Third Industrial Revolution (1970–2000), centred on information and communication technologies (ICT), has also brought about structural changes to economies and states. At the end of the last century, digitalisation, automation and financial liberalisation facilitated a new wave of globalisation, characterised by transnational value chains, massive capital flows and unprecedented market integration. These dynamics favoured the emergence of major new international players, particularly China, but also other countries in the Global South, a phenomenon accelerated by the end of the Cold War and the integration of China, India and other Asian economies into the dynamics of globalisation.

The diffusion of technological progress and innovation from the West to the rest of the world has resulted in the gradual erosion of Western dominance and the transition towards a multipolar international order in which economic and technological power is more diffusely distributed. Within this dynamic, China’s rise has led to the emergence of a power capable of competing economically, technologically and militarily with the US. This has prompted analysts to consider the possibility of conflict between the two powers in accordance with historical patterns observed between established and rising powers, referred to in terms of the ‘Thucydides Trap’ by authors such as Allison (2017), who identified sixteen major power transitions throughout history, concluding that only four did not result in armed conflict.

The Fourth Industrial Revolution, which began around 2010 with advances in robotics, global connectivity and artificial intelligence, is deepening these transformations in an even more distinctive manner. The centre of gravity of corporate power has shifted from traditional sectors—such as energy or finance—towards the technology sector, which ranges from cloud software and semiconductors to critical digital infrastructure and social media platforms and networks.

This shift has led to increasing state intervention in areas previously considered predominantly private. Major powers now compete to control the strategic nodes of the digital economy: data, algorithms, connectivity infrastructure and computing power. In this context, artificial intelligence has become a central arena of geopolitical rivalry, particularly between the US and China, with direct implications for alliances, international norms and balances of power. AI is not only transforming productive and labour relations within states but is also reshaping the architecture of global power by introducing new technological asymmetries and dependencies. As in previous technological revolutions, those who succeed in mastering these capabilities will largely define the rules of the international order of the twenty-first century and the hierarchy of power within it.

Whereas in the 1980s the world's largest companies by market capitalisation were the major oil or banking firms, today that position is occupied by major US tech firms such as Nvidia, Google, Amazon, Apple and Meta, with Chinese tech firms trailing far behind and no significant presence of European companies among the world's twenty largest. This corporate landscape today maps out the distribution of global economic and technological power, but also new geopolitics so profoundly shaped by the transformation of interdependencies into vulnerabilities (Leonard, 2021), asymmetries in technological capabilities and connectivity wars, just as the second half of the 20th century was shaped by asymmetries surrounding access to oil and gas.

The international consequences of this reshaping of the world around digital technologies are clear. Just as the economy based on the exploitation of fossil fuels gave rise to an international order and a series of alliances linked to access to and control of production centres in the Middle East and the Persian Gulf, the current data-driven economy is generating its own system of international relations, based on access to critical raw materials necessary to sustain technological development and to the supply chains, production centres, and distribution networks of digital technologies—particularly Taiwan. For Europe, the new geopolitics of technology implies a transition from dependencies and vulnerabilities associated with oil and gas from the Middle East and Russia to becoming trapped in a new dependence on artificial intelligence models, data centres, semiconductors, and other technologies contested between the United States and China.

2 The new geopolitics of technology

As highlighted in the previous section, technological innovations have repeatedly brought about profound transformations both within states and within the international system, altering power relations, forms of political organisation, and the dynamics of conflict and cooperation. However, and despite the clear continuities between the current technological revolution and previous historical processes, it is possible to identify a series of qualitatively novel elements that distinguish contemporary technological transformation from preceding revolutions.

First, it is worth noting the speed, scope and depth of current technological changes, particularly with regard to global connectivity and the dissemination of innovations. Whilst key 20th century technologies, such as the telephone, took nearly half a century to reach one million users and a century to reach 100 million, contemporary tools based on generative artificial intelligence, such as ChatGPT, reached one million users in five days and 100 million in five months (Hu, 2023). This phenomenon is not exceptional, but rather representative of a broader dynamic: the spread of new technologies no longer follows gradual patterns, but rather accelerated and simultaneous processes on a global scale.

A similar transformation can be observed in the economic sphere. Historically, the expansion of international trade was constrained by physical, technological and regulatory barriers, advancing progressively and in waves linked to improvements in transport and communications. In contrast, trade in digital services lacks these material constraints, which has enabled technology companies to scale their business models extremely rapidly and operate simultaneously in multiple national markets. This feature reinforces the concentration of economic and technological power in a limited number of players—particularly American ones—capable of exploiting global economies of scale.

A second novel element concerns the transformation of the concept of security brought about by technological development. Alongside the traditional domains of warfare—land, sea, air and space—a fifth operational domain has emerged: cyberspace, which encompasses not only attacks on critical infrastructure, with increasing potential due to the growing connectivity of devices (the Internet of Things), but also the manipulation of the informational or cognitive domain.

In this domain, both defensive and offensive operations are conducted that can seriously affecting states' ability to act. These actions may have a direct material impact, by degrading or rendering military systems, critical infrastructure or command and control networks inoperable, but also a psychological and social impact, through disinformation campaigns, information manipulation and influence operations aimed at eroding social cohesion and the will to resist among the rulers and civilian population of a state, often making use of agents of influence or local political forces that amplify such content.

Authoritarian regimes, particularly Russia and China, have found the openness and lack of regulation of social media platforms in the West to be a highly effective tool for consolidating their power, both domestically and internationally. As Margarita Simonyan, director of Russian state media, pointed out, *Russia Today*, *Sputnik* and the global network of Russian media exist for the same reason that the Russian Ministry of Defence exists: to wage information warfare against the West, creating and captivating audiences which, as was evident immediately prior to the invasion of Ukraine, can be mobilised at critical junctures (Torreblanca, 2020).

The US experience during the 2016 presidential election clearly illustrates the destabilising potential of operations combining cyberattacks and disinformation. The hack of the Democratic Party's servers, coupled with the mass exposure of the population—estimated at up to 136 million people—to fake news amplified political polarisation and internal social divisions (Taylor *et al.*, 2018).

Similarly, in the European context, from 2014 onwards, following the first invasion of Ukraine, Russia exploited the openness of social media, the weakness of traditional media and the vulnerability of public opinion to false or biased information to launch massive disinformation campaigns aimed at weakening and dividing European democracies.

Such interference was particularly visible during processes such as the 2016 referendum on the United Kingdom's membership of the EU (Brexit), but also in Spain. In our country, the events surrounding the illegal attempt at secession in Catalonia in 2017 highlighted how the most serious external threat to national sovereignty experienced by Spain in its recent democratic history did not take the form of conventional military action, but rather materialised through a widespread disinformation and foreign influence operation attributed to Russia. With the aim of weakening the EU and NATO by encouraging within Spain a phenomenon similar to the colour revolutions and the pro-democracy protests within Russia—which it believed the West had instigated—Moscow created a comprehensive disinformation ecosystem comprising official media outlets, strategic alliances with separatists, manipulation of social media, and the mobilisation of proxies with influence on both the far right and the far left (Alandete, 2017; Fernández, 2024; Schwirtz and Bautista, 2021; and Washington Post, 2017).

Disinformation phenomena, which intensified during the pandemic, leading the WHO to speak of an 'infodemic', demonstrate how manipulation of the information space can have strategic consequences comparable to those of traditional military instruments, and how certain actors can exploit these tools to their advantage.

A third distinctive element of the current technological revolution is the central role of private technology companies as providers of essential services for national sovereignty. Whereas in earlier historical periods strategic sectors such as banking, insurance, rail transport or the automotive industry were often privately owned, they could, at least in theory, be replicated or nationalised by the state in emergency situations.

During the Second World War, for example, civilian industrial capacities were converted relatively quickly for military purposes, as was the case with the automotive and aviation industries. Today, however, a substantial part of the critical infrastructure underpinning the functioning of advanced economies is in the hands of private companies, without the state having the technical, financial or temporal capacity to replace them. This is the case with cloud computing services, advanced semiconductor manufacturing, the deployment and maintenance of submarine communications cables, and low-orbit satellite networks. These infrastructures are crucial for both economic activity and military and intelligence capabilities, but they far exceed the direct productive capacities of the public sector (Sánchez and Torreblanca, 2023).

The conflict in Ukraine has brought this new reality into sharp relief. Western technology companies, particularly American ones such as Microsoft, Amazon and Starlink, have played a key role in safeguarding Ukraine's critical digital infrastructure, providing essential services to its armed forces—especially in relation to data acquisition and processing—and mitigating Russian cyberattacks. The growing fusion between the US Pentagon and certain software and digital services companies specialised in the military domain, such as Anduril or Palantir, paints a highly concerning picture. Just as Eisenhower had warned in 1953 about the power of what he called the 'military-industrial complex', this concern over the structural power of private companies and their links to national sovereignty led President Biden to issue a similar warning in his farewell address regarding the 'tech-industrial complex' and the consequences for democracy in the US and worldwide of the enormous concentration of power in the hands of a small number of tech companies (Biden, 2025; Bria, 2025).

As would be demonstrated from the inauguration of President Trump in January 2025 and in the months that followed, major American technology companies were able, with little effort, to ensure that the White House adopted as its own their longstanding grievances and demands against European legislation on digital services and markets, leading to a direct confrontation and a series of open coercive measures against the EU—and, notably, also against the United Kingdom.

All these transformations have profound implications for international security. Traditionally, technological evolution and military doctrine tended to advance more or less in parallel, allowing states and their armed forces sufficient time to adapt their organisational structures, strategies and defence industries. In the current context, however, the pace of technological innovation far exceeds the planning, procurement and deployment cycles of military capabilities, whose time horizons are necessarily longer. As a result, technological acceleration introduces high levels of strategic uncertainty, making it difficult to anticipate threats and formulate stable doctrines (Frías, 2024).

Henry Kissinger drew attention to this problem in one of his most recent works (Kissinger *et al.*, 2021). The post-Second World War international order was stabilised by the existence of the nuclear weapon, which not only established a clear and widely recognised hierarchy of power but also allowed for the development of a rational, explicit and shared theory of deterrence, regardless of ideological differences between actors. The possession of nuclear weapons, which was measurable and verifiable, facilitated strategic predictability.

In the case of artificial intelligence, however, Kissinger warned that the attempt to turn this technology into a vector of military power faces a fundamental challenge: the difficulty of constructing an effective theory of deterrence based on a technology whose limits, capabilities and effects remain largely uncertain. Unlike the nuclear weapon, whose use in the Second World War allowed for the consolidation of a theory and practice of deterrence and even the establishment of limitation and non-proliferation agreements, artificial intelligence could prove strategically more effective as a covert capability, capable of being employed unilaterally and by surprise to launch pre-emptive strikes. This characteristic increases uncertainty and raises the risk of systemic instability.

If artificial intelligence constitutes, as Kissinger suggested, the contemporary equivalent of a new Manhattan Project, the central challenge lies not only in its technological development, but in the creation of a framework for deterrence and international governance capable of stabilising its use and preventing dynamics of uncontrolled escalation. Without a theory of deterrence adapted to this new technological reality, the risk is not a lack of balance, but the creation of a structurally more unstable international order.

In a historical trajectory marked by the interactions between technology and the international order, artificial intelligence—although it is progressively reshaping the power relations and hierarchies between states and the international order itself, centred on a bipolar competition between the US and China, which can undoubtedly be described as ‘digital’ (Bradford, 2023), has not yet brought about a decisive rupture that would allow for a conclusive definition of the new characteristics of global power or its elements of stability or instability.

3 Decoupling, the Cold War and technological spheres of influence

The dominant geopolitical trend today is characterised by an increasing securitisation of technology. States no longer view technological innovation primarily as a factor of economic efficiency or social welfare, but as a strategic resource of power. Consequently, every technological advance is assessed according to two central criteria: the relative power it may confer on third parties and the degree of strategic vulnerability it may generate for the state itself (Torreblanca, 2021).

This logic reflects a scenario in which states prioritise relative gains over absolute gains. Historical experience shows that, when this logic prevails, states are willing to sacrifice their own economic growth if this helps to curb, contain or slow down the technological—and, by extension, military—development of their strategic rivals. At the same time, they seek to reduce levels of interdependence deemed excessive or dangerous through strategies of selective decoupling, particularly in critical technology sectors.

This analytical framework helps explain three closely linked contemporary dynamics: first, the restrictions imposed by the US on the export of advanced technologies to China; second, the acceleration of China's strategy for technological autonomy; and third, the EU's insistence on achieving so-called digital sovereignty.

The closest historical parallel lies in the 1980s, when the Reagan administration sought to prevent the Soviet Union from accessing dual-use digital technologies with the aim of slowing its economic and military development. We are thus entering a new technological cold war with its own distinct characteristics, in which control, access and denial of markets, data and critical technologies occupy a central place in the political and strategic debate.

The geopolitical instrumentalization of technology and digital interconnectivity has generated growing disputes across multiple strategic areas: critical digital infrastructure (such as 5G networks and submarine cables), essential raw materials (including rare earths), key industries (artificial intelligence, cloud computing, semiconductors), the control of data flows and storage, as well as the definition of technical standards that will shape the future development of emerging technologies.

In this context, numerous states have begun to erect digital borders, adopting data localisation policies, controls on the export of sensitive technologies and restrictions on the mobility of scientific talent (Ferracane *et al.*, 2018). At the same time, they seek to build spheres of technological influence with countries considered politically aligned, with the aim of expanding and consolidating both their structural power and their regulatory and technological models.

Historically, technologies associated with major revolutions—agricultural, industrial or informational—tended to spread relatively widely once their initial phase of development had been overcome (Ding, 2024). No state has managed to consistently deny others access to technologies such as the steamship, electricity or, more recently, nuclear energy for civilian or even military use. Even contemporary attempts to limit the proliferation of nuclear weapons have had only partial and temporary success.

During the Cold War, although the Western bloc sought to restrict the Soviet bloc's access to certain technologies, the global technological ecosystem remained essentially unified. The major powers developed comparable military technologies, involving extensive copying, espionage and adaptation. By contrast, the present moment is characterised by an unprecedented trend towards the fragmentation of the international technological system into at least two large, differentiated and incompatible blocs: one led by the United States and the other by China.

The US has pioneered the development of an integrated technological ecosystem, capable of covering virtually all critical layers: from space and satellite infrastructure to undersea cables, digital platforms, cloud services and advanced artificial intelligence capabilities. To achieve full technological autonomy, Washington still relies on certain strategic bottlenecks, such as advanced lithography for semiconductor manufacturing—dominated by the Dutch firm ASML—or the extraction and refining of rare earths, essential for the technology and defence industries, which China has dominated for decades.

China, for its part, has deployed a deliberate, long-term strategy aimed at technological self-sufficiency. Through the early identification of critical sectors and massive state-coordinated investment, combined with a highly effective industrial espionage strategy, Beijing has managed to position itself ahead of the US in certain strategic technologies and significantly reduce its external dependence. Although the manufacture of advanced semiconductors remains its main area of vulnerability, China is on a clear path towards technological convergence in this field.

As a result, both the US and China are now in a position to offer their partners and allies comprehensive technological solutions that exclude, either wholly or partially, the rival bloc. In a manner analogous to the construction of a 'great digital wall' in the Chinese domestic market—through the exclusion of major US technology firms—Beijing has sought to expand its structural power by creating its own sphere of technological influence on an international scale.

These dynamics evoke the so-called 'Great Game' of the 19th century between the British Empire and the Russian Empire, in which competition for spheres of influence combined strategic, economic and technological interests. In the current context, technological alliances enable major powers to access new markets, raw materials and data flows, whilst striving to impose their technical and regulatory standards globally (Hobbs *et al*, 2016; Financial Times, 2022).

According to available data, China has exported surveillance technologies to more than sixty countries, including Iran, Myanmar, Venezuela and Zimbabwe, many of which have serious human rights deficits (Feldstein, 2019). Thirty-six of these countries are part of the Belt and Road Initiative, which facilitates their access to concessional financing to acquire technologies from Chinese companies such as Huawei, Hikvision, Dahua and ZTE. In other emerging fields, such as blockchain, Beijing has promoted initiatives such as the Blockchain-Based Service Network (BSN) with the aim of reshaping the global digital architecture and creating infrastructures based on standards defined by China. At the same time as it exports technology, China imports critical raw materials to sustain its technological development, generating extractive relationships and processes of economic re-primarisation that resemble a new form of digital colonialism.

Liberal democracies have not remained outside these dynamics. In addition to using and exporting surveillance technologies, they have promoted digital alliances aimed at limiting the expansion of Chinese technological power. A significant example was the Clean Network Initiative, promoted during the first Trump administration by the then Secretary of State, Mike Pompeo, which sought to encourage US allies to restrict the use of Chinese technologies and adopt what were termed 'clean' infrastructures in areas such as networks, applications, cloud services, cables and data routes (BBC News, 2020).

This group included EU member states, along with Asian allies such as Japan, Israel, Australia, Canada, India and New Zealand, as well as Latin American nations, and explicitly invoked Cold War-style containment strategies. Gradually, in Europe, Latin America and other regions, numerous countries have begun to distance themselves from Chinese suppliers, considered “high-risk”, whilst China has intensified its efforts to replace Western technologies with domestic solutions in its own market.

Technological competition is also expressed through the increasing use of foreign influence operations, disinformation and cyber-attacks, which have become central instruments of contemporary hybrid warfare. These practices have encouraged many states to reduce their level of digital interconnection and even to fragment the Internet and their technological industrial bases in order to limit strategic dependencies.

Consequently, although the technological revolution will continue to advance, its trajectory will no longer be guided exclusively by market logic, private economic actors or multilateral institutions. On the contrary, governments have come to play a central role, steering technological development according to criteria of national security, geopolitical competition and strategic control, shaping an increasingly fragmented and competitive international system. We have thus moved from the aspiration of global interconnection to the reality of technological balkanisation, decoupling and the reduction of interdependencies and vulnerabilities.

4 The EU: from regulatory superpower to digital colony

The role of the European Union in an international system increasingly dominated by technological rivalries is deeply problematic. By its nature as a civilian and normative power, the EU has historically tended to conceive technology as an instrument of economic prosperity, social cohesion and the expansion of rights, rather than as a vector of geopolitical power. This approach has translated, particularly over the past decade, into a strong commitment to a regulatory governance of technology centred on the protection of fundamental rights, fair competition and the limitation of abuses of power by private actors.

This strategy has earned the Union the label of a ‘regulatory superpower’, fostering the expectation that it might consolidate itself as a third normative technological pole, alternative to the American and Chinese models. In this vision, Europe aspires to become an attractive space for those states and societies that support a rules-based international order, with relatively open access to technology, where technology is not a source of strategic coercion or structural dependency, but a multiplier of development, inclusion and individual autonomy (Hobbs and Torreblanca, 2020).

Through the so-called 'Brussels effect', the EU has demonstrated a remarkable capacity to export its regulatory standards, particularly in areas such as privacy and data protection. European regulations such as the GDPR, which governs data privacy, came to be regarded as the 'gold standard' of digital regulation on a global scale. The size and attractiveness of the European market meant that, even in the absence of major domestic digital platforms, leading US technology companies operated in Europe under significantly stricter standards than those in force in the US, where the lack of comprehensive federal privacy legislation has resulted in a much looser and more fragmented framework (Bradford, 2020).

However, the implicit assumption that Europe could benefit from advanced digital services without developing equivalent industrial capabilities of its own has been gradually eroded as the geopolitical competition for technology between the US and China has intensified.

In an initial phase, the US successfully pressured the EU to decouple technologically from China, particularly in sectors such as 5G networks, thereby depriving member states of relevant technological alternatives. Subsequently, Washington began to exploit Europe's dependence on US technology to challenge European regulations and seek exemptions or favourable reinterpretations for its companies. Finally, as Sino-American rivalry has intensified, Washington has stepped up pressure on Brussels to align its regulatory standards with those of the US, describing European regulations as extraterritorial, discriminatory and even extortionate.

This dynamic has placed the EU in a position of structural vulnerability, as it lacks the material capacity necessary to credibly evade coercion from both the US and China. The European strategy of developing indigenous technological alternatives in areas such as semiconductors, cloud computing and artificial intelligence constitutes a rational response, but one that is extremely costly in terms of time, financial resources and political coordination. Consequently, this approach cannot guarantee European digital sovereignty in the short term, forcing the EU to operate for an extended period under conditions of strategic dependence.

Us pressure on Europe to reject Chinese technology began during the first Trump administration, but not only continued, it intensified under the Biden administration, particularly through the proliferation of export controls on critical technologies to China. According to the description by then-National Security Advisor Jake Sullivan, the US would build a ‘small garden with high fences’ in the technological sphere (The White House, 2023). However, the inclusion in these restrictions of the three most strategic technologies of the present day—artificial intelligence, semiconductors and quantum computing—showed that this ‘garden’ was far from small. On the contrary, it signalled the launch of a direct challenge to China.

Another revealing episode of Europe’s vulnerability *vis-à-vis* the US occurred with the Dutch government’s decision, in direct response to US pressure, to force the company ASML to cease the export of extreme ultraviolet lithography machines, which are indispensable for the manufacture of advanced semiconductors. This case has highlighted the extent to which even Europe’s few critical technological advantages could be neutralised by external political decisions (Qin, 2024).

Europe’s dependence on private US technology companies has been laid bare even further during the war in Ukraine. In September 2022, Elon Musk ordered a restriction on Ukrainian access to the Starlink low-orbit satellite system, which is crucial for Ukrainian military communications (Roulette *et al.*, 2025). Musk justified his decision by citing fears of a nuclear escalation. This episode highlighted the risks inherent in essential technological capabilities for collective security being controlled by private actors capable of directly influencing strategic dynamics of the highest order.

The Starlink case marked a turning point for the EU, as it brought into sharp relief the consequences of outsourcing critical infrastructure to foreign private companies. This episode has been compounded by Musk’s growing vitriol against the EU during the US election cycle, in line with the positions of then-President Donald Trump and the MAGA movement. These positions were reinforced by statements from then-Senator J. D. Vance, who went so far as to question the US commitment to Europe, citing an alleged decline in European democratic standards due to its digital regulations.

Following his appointment as US Vice-President, Vance elevated this criticism to the central tenet of US policy towards Europe in a controversial speech delivered at the Munich Security Conference in February 2025, in which he argued that the main threat to Europe did not come from Russia, but from internal restrictions on freedom of expression (Vance, 2025).

That same month, President Trump instructed his Secretaries of Commerce and the Treasury to respond to what he described as European ‘regulatory extortion’, in direct reference to legislation on digital services and markets (The White House, 2025a). This explicitly activated the alliance between the White House and major US tech companies, already evident at Trump’s inauguration ceremony, which was attended by Silicon Valley’s top executives. Figures such as Mark Zuckerberg have equated European regulation with institutionalised systems of censorship comparable, in his view, to those of China. Both Zuckerberg and Musk have openly challenged the Union, refusing to comply with certain obligations relating to the fight against disinformation and online harms on platforms such as X.

Musk’s direct interference in European political processes, such as his explicit support for anti-establishment forces like Alternative for Germany (AfD) during the German parliamentary elections in February 2025, has had a significant political impact. Not only for backing an extremist force, but for normalising discourse that trivialised Germany’s historical past, which has been perceived as unprecedented interference by a foreign private actor.

A new source of concern has emerged with the Trump administration’s decision to impose sanctions on the International Criminal Court following the issuance of arrest warrants against Israeli Prime Minister Benjamin Netanyahu; the US forced Microsoft to withdraw email services from the prosecutor in charge of the case. The company complied with the order, demonstrating that, under US law, companies must comply first and litigate later, even when this affects international institutions based in Europe (Satariano and Smialek, 2025).

This episode has unequivocally highlighted the systemic risk arising from Europe’s dependence on US cloud computing services. Whilst it has reinforced interest in developing sovereign European cloud infrastructures, it has also confirmed that such alternatives would not be available in the short term, thereby prolonging Europe’s exposure to potential political coercion.

Finally, the publication of the US national security doctrine in December 2025 has confirmed Europe’s worst fears, by openly legitimising the exploitation of US technological superiority for the purpose of political transformation in Europe. The US strategy describes Europe as a victim of an anti-democratic ideological drift and advocates the need to promote the rise to power of political forces aligned with Trumpism. The fear, from a European perspective, is that the US will replicate—through private digital platforms—tactics of influence like those previously employed by Russia, triggering a head-on transatlantic clash over digital services, regulatory sovereignty and democracy (The White House, 2025b).

Taken together, these episodes reveal that the EU faces not only a deficit in technological capabilities, but an existential challenge in terms of sovereignty and democracy, in a context where technology has ceased to be a neutral asset and has become a central instrument of geopolitical coercion.

5 Building European digital sovereignty

The EU has explicitly recognised that technology constitutes a central dimension of its security and political autonomy (European Commission, 2023). The European Commission formed following the June 2024 elections gives concrete expression to this recognition by creating, for the first time, an executive vice-presidency dedicated to Technological Sovereignty, marking a turning point in the European conception of power in the 21st century.

Although the concept of technological sovereignty is not unambiguous—and is particularly complex in a global context characterised by deep interdependencies and cross-cutting vulnerabilities—the European institutions use it to refer to a specific idea: the Union's ability to make digital and technological decisions in accordance with its own interests and values, without being subject to external coercion arising from critical dependencies.

From this perspective, ensuring European technological security requires action on three complementary fronts: developing our own capabilities, building resilience against coercion, and defending the democratic space.

The first pillar—unavoidable, yet long-term—consists of developing a European technological and industrial base in those areas where external dependence creates economic or security risks. The mission letter sent by Commission President Ursula von der Leyen to the head of the new portfolio clearly identifies these sectors: supercomputing, semiconductors, cloud computing, artificial intelligence, quantum computing, space technologies, the Internet of Things and genomics (European Commission, 2024).

Without its own capabilities in these areas, the EU lacks any real room for manoeuvre. Technological security cannot be sustained solely through regulation if there is no physical infrastructure capable of offering credible alternatives. However, this strategy requires massive investment, coordination between member states and an explicit political acceptance that industrial policy is an unavoidable necessity for national security.

Given that developing these capabilities will take years, the EU needs short- and medium-term instruments of protection and deterrence against technological coercion by third parties, including its allies. Recent experience shows that Europe's dependence on US digital technologies and services can be used as a lever for political, regulatory or even ideological pressure.

To mitigate this vulnerability, the Union should adopt a strategy that, first, makes strategic use of trade policy, bearing in mind that the US maintains a structural surplus with the EU in digital services; second, strengthens competition policy, reducing the market power—and by extension political power—of large technology platforms; thirdly, advance common fiscal instruments, indispensable for financing strategic technological investments and preventing regulatory capture; and fourthly, explore national security tools, including European preference clauses or selective restrictions in sectors deemed critical.

These instruments have already been applied in relation to China, particularly to reduce dependence on Chinese companies subject to legal frameworks that compel them to cooperate with their intelligence services. Given that the US has legislation with comparable extraterritorial effects, the EU must also begin to assess the security risk posed by its exposure to US companies, particularly in areas such as the cloud, digital platforms or data infrastructure.

A third element of European technological security is the defence of democratic processes against digital interference. The EU has made significant progress in this area through the Digital Services Act and the Digital Markets Act, as well as with the adoption of the so-called 'democratic shield', which explicitly recognises electoral processes as critical infrastructure on a par with energy or transport infrastructure

This approach is essential in a context where digital platforms—whether US or Chinese—can be used as vehicles for disinformation, manipulation of information or indirect support for political forces hostile to democracy. Ensuring technological security therefore implies safeguarding the integrity of public debate, including against private actors with the capacity for systemic influence.

Despite its vulnerability in other areas, the EU has demonstrated that it must not relinquish its regulatory power. The effective application of European digital legislation to large tech companies, including penalties for non-compliance, constitutes one of the few instruments of structural power at the EU's disposal. Giving ground in this area would not reduce external pressure, but rather increase it, by confirming that technological dependence can translate into political subordination. Regulatory firmness is not incompatible with transatlantic cooperation; indeed, it is a prerequisite for such cooperation to be based on more symmetrical relations (Torreblanca, 2025).

In a world where there are only two major technological poles—the US and China—the EU faces the risk of becoming a digital colony if it does not act decisively. Paradoxically, its vulnerability is currently greater *vis-à-vis* the United States than *vis-à-vis* China, precisely because of the depth of existing interdependence. Ensuring European technological security therefore requires a combination of ambitious industrial policy, instruments of defence against coercion, protection of the democratic space and sustained political will. Technological sovereignty is not an end in itself, but a necessary condition for preserving the European political, economic and social model in an increasingly competitive and coercive international environment.

Conclusion

Technology has become a central factor in international power, comparable to territory, population or strategic resources. The current technological revolution, characterised by its speed, global reach and the structural role of private actors, is accelerating the securitisation of innovation and pushing the international system towards a logic of rivalry, fragmentation and competition between technological blocs led by the US and China.

In this context, the EU occupies an ambivalent position. Its strength as a regulatory power has enabled it to influence global digital governance, but its lack of its own industrial capabilities in critical technologies exposes it to dependencies that already translate today into extreme vulnerability to external coercion.

Regulation alone is not enough to defend European sovereignty in an increasingly hostile geopolitical environment. Ensuring European technological security therefore requires an integrated strategy that combines long-term industrial policy, instruments of resilience and deterrence against technological coercion, and enhanced protection of the democratic sphere against digital interference. Technological sovereignty is the necessary condition for preserving the EU's decision-making capacity, democratic model and strategic autonomy in the international order of the 21st century.

Bibliography

Alandete, D. (2017). The Russian plot used Chavista networks to gain influence in Catalonia [online]. *El País*. [Accessed: 15 January 2026]. Available at: https://elpais.com/politica/2017/11/10/actualidad/1510341089_316043.html

Allison, G. (2017). *Destined for War: Can America and China Escape Thucydides's Trap?* Houghton Mifflin Harcourt.

BBC News. (2020). Huawei ban: UK to impose early end to use of new 5G kit [online]. *BBC News*. [Accessed: 15 January 2026]. Available at: https://www.bbc.com/news/business-55 124 236

Biden, J. (2025). *President Biden's Farewell Address. The White House, 15 January* [online]. The White House. [Accessed: 15 January 2026]. Available at: https://www.presidency.ucsb.edu/documents/farewell-address-the-nation-4

Bria, F. (2025). The coup d'état by the techno-authoritarians: from post-democratic America to the Europe to come [online]. *La Vanguardia*. [Accessed: 15 January 2026]. Available at: https://www.lavanguardia.com/internacional/20251102/11220880/golpe-tecnoautoritarios-america-postdemocratica-europa-viene.html

Bradford, A. (2020). *The Brussels Effect: How the European Union Rules the World*. Oxford University Press.

—. (2023). *Digital Empires: The Battle for Global Tech Dominance*. New York, Oxford University Press.

Ding, J. (2024). *Technology and the Rise of Great Powers: How Diffusion Shapes Economic Competition*. Princeton University Press.

European Commission. (2023). Joint Communication to the European Parliament, the European Council and the Council on "European Economic Security Strategy" (JOIN/2023/20 final) [online]. European Commission. [Accessed: 15 January 2026]. Available at: https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex:52023JC0020

—. (2024). Mission Letter from Ursula von der Leyen, President of the European Commission, to Henna Virkkunen, Executive Vice-President-designate for Technological Sovereignty, Security and Democracy [online]. European Commission. [Accessed: 15 January 2026]. Available at: https://commission.europa.eu/document/download/3b537594-9264-4249-a912-5b102b7b49a3_en?filename=Mission%20letter%20-%20VIRKKUNEN.pdf

Feldstein, S. (2019). *The Global Expansion of AI Surveillance* [online]. CEIP. [Accessed: 15 January 2026]. Available at: https://carnegieendowment.org/research/2019/09/the-global-expansion-of-ai-surveillance?lang=en

Fernández, J. J. (2024). The army identifies a Russian influence network in Spain comprising 179 spokespersons [online]. *El Periódico*. [Accessed: 15 January 2026]. Available at: https://www.elperiodico.com/es/politica/20240718/ejercito-ecosistema-desinformacion-ruso-espana-altavoces-105779287

Ferracane, M. F.; Marel, Erik van der and Lee-Makiyama, H. (2018). *Digital Trade Restrictiveness Index* [online]. Brussels, European Centre for International Political Economy (ECIPE). [Accessed: 15 January 2026]. Available at: https://ecipe.org/wp-content/uploads/2018/05/DTRI_FINAL.pdf

Financial Times. (2022). US hits China with sweeping tech export controls [online]. *Financial Times*. [Accessed: 15 January 2026]. Available at: https://www.ft.com/content/6825bee4-52a7-4c86-b1aa-31c100708c3e

Frías, C. (2024). «Russia, Ukraine, and the 'Transparent' Battlefield.» Opinion Paper 18/2024 of the Spanish Institute of Strategic Studies (IEEE). Available at: https://www.ieee.es/Galerias/fichero/docs_opinion/2024/

Headrick, D. R. (1979). *The Instruments of Empire: Technology and European Colonialism in the Nineteenth Century*. Madrid, Alianza.

Hobbs, C.; Puddephat, A. and Torreblanca J. I. (2016). The Geoeconomics of the Digital. In: Leonard, M. (ed.). *Connectivity Wars: Why Migration, Finance and Trade and the Geo-Economic Battlegrounds of the Future* [online]. European Council on Foreign Relations. [Accessed: 15 January 2026]. Available at: https://ecfr.eu/archive/page/-/Connectivity_Wars.pdf

Hobbs, C. and Torreblanca, J. I. (2020). *Europe's Digital Sovereignty*. Madrid, Catarata.

Hu, K. (2023). ChatGPT sets record for fastest-growing user base in history [online]. *Reuters*. [Accessed 15 January 2026]. Available at: https://www.reuters.com/technology/chatgpt-sets-record-fastest-growing-user-base-analyst-note-2023-02-01/

Kissinger, H. A.; Schmidt, E. and Huttenlocher, D. (2021). *The Age of AI: And Our Human Future*. Little, Brown and Company.

Leonard, M. (2021). *The Age of Unpeace: How Connectivity Causes Conflict*. Bantam Press.

Qin, S. (2024). ASML Cancels Some Shipments to China at Biden Administration's Request [online]. *The Wall Street Journal*. [Accessed: 15 January 2026]. Available at: https://www.wsj.com/tech/netherlands-blocks-asml-exports-of-some-chip-making-equipment-to-china-2fe4a162

Roulette, J.; Bryan-Low, C. and Balmforth, T. (2025). Musk ordered shutdown of Starlink satellite service as Ukraine retook territory from Russia [online]. *Reuters*. [Accessed: 15 January 2026]. Available at: https://www.reuters.com/investigations/musk-ordered-shutdown-starlink-satellite-service-ukraine-retook-territory-russia-2025-07-25/

Sánchez, I. and Torreblanca, J. I. (2023). Ukraine one year on: When tech companies go to war [online]. European Council on Foreign Relations. [Accessed: 15 January 2026]. Available at: https://ecfr.eu/article/ukraine-one-year-on-when-tech-companies-go-to-war/

Satariano, A. and Smialek, J. (2025). Europe's Growing Fear: How Trump Might Use U.S. Tech Companies Against Europe [online]. *New York Times*. [Accessed: 15 January 2026]. Available at: https://www.nytimes.com/2025/06/20/technology/us-tech-europe-microsoft-trump-icc.html

Schwirtz, M. and Bautista, J. (2021). Married Kremlin Spies, a Shadowy Mission to Moscow and Catalonia [online]. *New York*

Times. [Accessed: 15 January 2026]. Available at: https://www.nytimes.com/2021/09/03/world/europe/spain-catalonia-russia.html

Taylor, J; Ewing, P. and Johnson, C. (2018). Grand Jury Indicts Russians Linked To Interference In 2016 Election [online]. *National Public Radio*. [Accessed: 15 January 2026]. Available at: https://www.npr.org/2018/02/16/586500591/grand-jury-indicts-russians-linked-to-interference-in-2016-election

Torreblanca, J. I. (2020). Democracy and social media. In: Lapuente, V. and Costas, E. (eds.). *How to save liberal democracies* [online]. Madrid, Círculo de Empresarios, pp. 131–150. [Accessed: 15 January 2026]. Available at: https://circulodeempresarios.org/app/uploads/2020/06/Libro-Democracias-Liberales-OK-paginas.pdf

—. (2021). Technology. In: Leonard, M. and Krastev, I. (eds.). *The Power Atlas: Seven Battlegrounds of a network world* [online]. European Council on Foreign Relations. [Accessed 15 January 2026]. Available at: https://ecfr.eu/wp-content/uploads/power-atlas.pdf

—. (2025). Big tech, Donald Trump, and techno-imperialism: How Europe can avoid becoming a digital colony [online]. European Council on Foreign Relations. [Accessed: 15 January 2026]. Available at: https://ecfr.eu/article/big-tech-donald-trump-and-techno-imperialism-how-can-europe-avoid-becoming-a-digital-colony

Vance, J. D. (2025). Speech by J.D. Vance. J.D. Vance (Vice President, United States of America) speaking on "The U.S. in the World" [online]. Munich Security Conference. [Accessed: 15 January 2026]. Available at: https://securityconference.org/en/medialibrary/asset/the-speech-of-jd-vance-20250214-1817/

Washington Post. (2017). Catalonia held a referendum. Russia won. 2 October 2017. Available at: https://www.washingtonpost.com/opinions/global-opinions/catalonia-held-a-referendum-russia-won/2017/10/02/f618cd7c-a798-11e7-92d1-58c702d2d975_story.html

The White House. (2023). Remarks by National Security Advisor Jake Sullivan on Renewing American Economic Leadership at the Brookings Institution [online]. The White House. [Accessed: 15 January 2026]. Available at: https://www.presidency.ucsb.edu/documents/remarks-national-security-advisor-jake-sullivan-renewing-american-economic-leadership-the

—. (2025a). Defending American Companies and Innovators From Overseas Extortion and Unfair Fines and Penalties [online]. The White House. [Accessed: 15 January 2026]. Available at: https://www.whitehouse.gov/presidential-actions/2025/02/defending-american-companies-and-innovators-from-overseas-extortion-and-unfair-fines-and-penalties/

—. (2025b). *National Security Strategy of the United States of America* [online]. Washington, DC, The White House. [Accessed: 15 January 2026]. Available at: https://www.whitehouse.gov/wp-content/uploads/2025/12/2025-National-Security-Strategy.pdf

Chapter Three

Middle powers and the new global disorder: adaptive pragmatism in the Trump 2.0 era

Eva Borreguero Sancho

Abstract

The return of Donald Trump to the US presidency has reactivated disruptive dynamics in the international system, marked by the extensive use of tariffs, the progressive weakening of multilateral institutions, and intensified great-power competition. This increasingly unpredictable environment has compelled middle powers to recalibrate their foreign policy strategies in order to reduce vulnerabilities and preserve decision-making autonomy. This article examines how India, Japan, Brazil, and the United Arab Emirates—despite their geographic, demographic, and political heterogeneity—have responded to this context through pragmatic strategies aimed at expanding their room for manoeuvre without openly challenging the existing order. By diversifying external ties, developing flexible partnerships, and relying on instruments such as mini-lateral frameworks, market diversification, and selective alignments, these states seek to adapt to systemic instability while avoiding rigid blocs. Rather than pursuing confrontation or systemic transformation, their responses reflect a form of adaptive pragmatism with differentiated expressions: India and Japan strengthen Indo-Pacific supply chains and deepen technological cooperation; Brazil leverages its role as an agricultural exporter and leader in clean energy, particularly within Mercosur and the Global South; and the United Arab Emirates consolidates its position as a logistical, energy, and digital hub, with a growing emphasis on artificial intelligence and global connectivity.

Keywords

Middle powers, Strategic autonomy, Adaptive pragmatism, Multi-alignment, India, United Arab Emirates, Japan, Brazil.

Introduction

Donald Trump's return to the White House has reignited far-reaching disruptive dynamics within the international system. The indiscriminate imposition of tariffs, the progressive weakening of multilateral institutions and the intensification of competition between major powers have created a scenario in which US diplomacy is perceived as increasingly erratic, forcing middle powers to recalibrate their foreign strategies.

Faced with uncertainty that appears set to become structural, these countries are adopting pragmatic responses aimed at reducing the risks arising from excessive dependence on Washington and expanding their autonomy in decision-making. This is not a matter of ruptures or rigid alignments, but of preserving room for manoeuvre in a less predictable and more fragmented order.

This paper analyses how India, Japan, Brazil and the United Arab Emirates—countries that are geographically, demographically and politically diverse—are responding to this situation through strategies designed to strengthen their room for manoeuvre. Through the diversification of ties, the development of flexible alliances and the use of instruments such as the opening of new markets, minilateral frameworks and selective forms of alignment, these middle powers seek to adapt to an unstable environment without openly challenging the existing order.

Far from promoting a head-on confrontation or a radical transformation of the international system, these responses are part of an *adaptive pragmatism* that takes on different forms. India and Japan are strengthening Indo-Pacific supply chains and deepening technological cooperation; Brazil is capitalising on its position as an agricultural exporter and its leadership in clean energy, particularly within Mercosur and the Global South; the United Arab Emirates are consolidating their role as a logistics, energy and digital hub, with a strategic focus on artificial intelligence and international connectivity.

1 Middle powers facing a new global disorder

The geopolitical and economic agenda of Trump 2.0 has accelerated trends that were already present on the international stage: the rise of protectionism, the use of tariffs, a renewed rivalry with China and explicit scepticism towards multilateralism. The result has been increased friction not only with declared rivals, but also with traditional partners—including the European Union, Japan, Brazil and India—particularly in sensitive areas such as trade, technology and economic security.

In this context, middle powers—states with regional weight, a degree of autonomy and the capacity to build flexible coalitions, such as India, Japan, Brazil and the UAE—are not seeking an open break with Washington, but rather to diversify dependencies and reduce vulnerabilities. To this end, they are weaving networks of collaboration which, in many cases, operate outside the logic imposed by the great powers.

The concept of *a middle power* has been subject to diverse interpretations in international relations, partly due to its imprecise nature and the difficulty of defining it using strict empirical criteria. Although its use dates back to the period following the Congress of Vienna (1815), it was after the Second World War that it acquired greater analytical relevance, driven by countries such as Canada, interested in distinguishing themselves from small states without aspiring to great power status. From a classical perspective (Laurence, 2023), these powers are understood as states which, whilst lacking the capacity to reshape the international order, possess sufficient resources and legitimacy to influence their environment. It is, therefore, a relational category, which can be approached both through material indicators—size, economy, population—and through their recognition as relevant international actors.

Other approaches place less emphasis on quantifiable attributes and more on modes of action (Chaziza and Lutmar, 2025). These powers would perform mediating functions, facilitate consensus and sustain spaces for multilateral cooperation, by interweaving national objectives with broader commitments without aspiring to dominant positions. To this may be added the means to develop niche diplomacies, focused on specific sectors or issues—natural resources, connectivity, technical expertise—which enable them to project influence beyond their material limits.

For the analysis proposed here, the distinction between traditional and emerging middle powers (Jordaan, 2003) is particularly useful, as it allows us to capture variations within this category. The former are typically consolidated, stable democracies with limited regional influence; their behaviour is oriented towards preserving the liberal order through multilateral cooperation and moderate concessions, while maintaining an ambiguous regional role. The latter correspond to semi-peripheral states, often marked by internal inequalities and recent democratisation processes, but with a more pronounced regional influence. Their actions combine a reformist drive regarding the international order—without adopting disruptive positions—with a desire to distinguish themselves from both the great powers and the weaker states in their immediate vicinity.

This distinction becomes especially relevant in the face of a transforming international order, which compels a rethinking of forms of external engagement. Faced with an uncertain and changing environment, the diversification of alliances, the reduction of unilateral dependencies and the strengthening of internal capabilities emerge as key responses on the part of these middle powers.

2 Japan, between alliances and friendshoring

Japan currently finds itself at an uncomfortable crossroads, affected by cross- cutting dependencies. Since 1952, its alliance with the United States has been the central pillar of national security and the ultimate guarantor of its defence. Any hint of a US withdrawal therefore arouses deep concern among the most conservative sectors of the Japanese security apparatus, who are aware of the limits of the country's defensive autonomy. At the same time, China's economic rise has made Beijing Japan's main trading partner, a key market for its industry and a significant source of opportunities, particularly against the backdrop of an ageing population that is hampering the economy's dynamism.

The coexistence of security dependence on the United States and an increasingly deep economic dependence on China has become more problematic as rivalry between the two powers intensifies. These circumstances have led Tokyo to seek a closer alignment with the United States, one that is no longer limited to territorial defence but extends to broader cooperation beyond its borders (Grano and Huang, 2023), leaving behind the phase in which it prioritised economic relations with China.

2.1 Change of leadership

This shift has gained coherence under the leadership of Sanae Takaichi, appointed Prime Minister in October 2025 following the resignation of Shigeru Ishiba. Her authority has been strengthened by calling early elections 110 days after taking office and securing the Liberal Democratic Party's biggest electoral victory in seven decades, with the additional milestone of becoming the first woman elected as Prime Minister in a society with deeply rooted patriarchal values. Her rise to power coincided with a period of unprecedented weakness for the Liberal Democratic Party, which, following electoral defeats in 2024 and 2025, lost its majority in both houses of Parliament for the first time since 1955. Linked to the party's most conservative wing, Takaichi represents a clear continuation of Shinzo Abe's legacy, centred on economic security, fiscal stimulus and a firm stance against external threats.

Her approach, sceptical of globalisation and centred on the defence of the national interest, seeks to expand the state's room for manoeuvre in tackling economic stagnation, demographic ageing and political fragmentation.

From this perspective, her address to the Diet (Prime Minister's Office of Japan, 2025) in October can serve as a policy statement. On defence, Takaichi set out two central pillars: the consolidation of the alliance with the United States as a cornerstone of Japanese foreign policy and the strengthening of security cooperation mechanisms in the Indo-Pacific. She emphasised the importance of deepening trilateral and quadrilateral consultations—such as Japan-US-South Korea, Japan-US-Philippines and the Quad—with the aim of strengthening regional deterrence capabilities in the face of persistent challenges, particularly those from China and North Korea.

The domestic agenda calls for a substantial increase in defence spending, to reach 2% of GDP as set out in the National Security Strategy, accompanied by urgent budgetary measures, including within the current financial year. Added to this is constitutional reform as one of the pillars of her political project. Takaichi seeks to accelerate debates in the Constitutional Deliberative Councils and to foster a cross-cutting discussion that transcends party and factional alignments, with active public participation. The aim would be to move towards a reinterpretation—and eventually a rewriting—of the constitutional framework, which defines the identity of post-war Japan as a pacifist nation, adapting it to new demands regarding defence and sovereignty.

One of the most revealing episodes at the outset of her mandate was the rapid deterioration of relations with China, following statements at the end of 2025 in which she asserted that an attack on Taiwan could pose an existential threat to Japan. Beijing's reaction was immediate: it demanded an official retraction and, faced with Tokyo's refusal, responded with a barrage of retaliatory measures that included the suspension of exports of dual-use goods (Sugiyama and Komiya, 2026)—key to sectors such as semiconductors, drones and electric vehicles—, restrictions on fishery products, the cancellation of cultural exchanges and travel warnings. The incident highlighted the growing intertwining of the economy and security, as well as Japan's vulnerability to external disruptions in its supply chains.

Relations with the United States have also been strained by recent disagreements. In early 2025, the Trump administration imposed a package of tariffs that directly affected Japanese exports, with a general tariff of 10%, additional surcharges and a specific tariff of 27.5% on automobiles. The measure was particularly significant given that Japan maintains a trade surplus with the United States and that, since 2019, it has established itself as the US's leading foreign investor, with a strong presence in the manufacturing sector. Following sustained diplomatic efforts, both sides reached an agreement in July 2025 that partially reduced tariffs on industrial products, although high levels were maintained in sensitive sectors such as steel and aluminium. In return, Tokyo made commitments to invest USD 550 billion in the United States and to make strategic purchases, including liquefied natural gas, agricultural products and defence- and technology-related equipment. The episode confirmed that, despite the structural value of the bilateral relationship, its functioning increasingly follows a transactional logic that prevents Tokyo from taking stability for granted.

Consequently, Japan accelerated an internal reorientation towards economic protection. In 2025, Tokyo formally incorporated the concept of 'economic statecraft', understood as the coordinated use of regulatory instruments and external alliances to safeguard sensitive sectors against pressure and interference. This approach, which goes beyond conventional trade policy, encompasses areas such as cybersecurity, the protection of critical infrastructure and the control of foreign investment in key industries. A decisive step was the reform of the Foreign Exchange and Trade Control Act (Yamazaki, 2026), which even allows for the retroactive requirement of divestment in sectors deemed vulnerable, aligning Japan with the more restrictive regulatory frameworks adopted by the United States and the European Union in the face of growing risks to industrial autonomy.

Regarding multilateralism, Tokyo has deepened its cooperation with the European Union. The 30th bilateral summit, held in July 2025, took place at a time of increasing state economic centralisation, the weakening of global institutions, and the increasingly frequent use of economic coercion. In response, both parties reaffirmed their commitment to a rules-based order and announced the creation of the Competitiveness Alliance (European Commission, 2025a), aimed at diversifying access to critical minerals and protecting their industrial capabilities in an increasingly politicised trade environment.

At the same time, the trilateral dialogue between Japan, the United States and South Korea, launched at the Camp David Summit of 2023, remains in place, although its medium-term prospects are not without uncertainty. Recent leadership changes in all three countries, coupled with the historical rifts that persist between Tokyo and Seoul, mean that any expectations of automatic consolidation must be treated with caution. Hence the need to foster greater interaction within this framework, particularly regarding shared concerns such as North Korean provocations, China's growing pressure on Taiwan and in the East China Sea, or the security of key maritime routes. Its continuity will ultimately depend on the three countries' ability to maintain a common operational agenda that goes beyond mere statements, including joint exercises, technological coordination, intelligence sharing and ongoing political dialogue (Kanodia, 2025).

By contrast, relations with India have continued to strengthen throughout 2025. Cooperation in defence, innovation and infrastructure has progressed steadily, as reflected in the 15th Annual India-Japan Summit held in Tokyo, which culminated in the adoption of a Joint Vision for the Next Decade structured around eight priority areas. Japan also announced plans to invest up to USD 68 billion in India by 2035. Initiatives such as the *Dharma Guardian* joint military exercise (Eldon, 2025) and the progress on the high-speed rail link between Mumbai and Ahmedabad illustrate a partnership that is translating into concrete action. Both countries reiterated their commitment to a free and open Indo-Pacific and to the QUAD, alongside the United States and Australia, understood as a flexible coordination framework rather than an exclusive alignment scheme.

Overall, Japan has embarked on a profound reconfiguration of its external projection. Without breaking with its traditional alliances, it has opted for a pragmatic adaptation that combines greater decision-making autonomy, the strengthening of internal capabilities and a selective expansion of its partners. From this year onwards, Prime Minister Takaichi's historic mandate—which consolidates her legislative capacity following her resounding electoral victory—will enable her to drive forward major, far-reaching reforms.

3 India: diversification and flexible non-alignment

Throughout 2025, Indian foreign policy has navigated difficult terrain, marked by external pressures, regional challenges and a deliberate reaffirmation of its policy of 'flexible non-alignment' in an unstable context. New Delhi has once again drawn upon a tradition of 'strategic autonomy' which, as Brookings Institution analyst Tanvi Madan has noted (Madan, 2026), it practised long before the concept was incorporated into the European vocabulary. This approach has enabled it to maintain functional—albeit unequal and complex—relations with actors as diverse as the United States, China, Russia and the United Arab Emirates, without relinquishing its room for manoeuvre. Throughout 2025, Narendra Modi's government operated under a carefully calibrated multi-alignment strategy, strengthening selective ties, containing regional pressures and projecting a diplomatic narrative underpinned by the idea of *Vishwabandhu* ('friend of the world').

3.1 2025: India awakens to the reality of Trump 2.0

The start of the year brought an unforeseen reversal in India's bilateral relationship with the United States. Washington imposed 50% tariffs on key Indian export products, such as textiles and chemicals, the highest alongside those applied to Brazil. The blow was particularly harsh given the nature of bilateral relations: over the past decade, both countries had built up growing cooperation in defence, technology and economic security, driven largely by shared concerns over China's rise. Although political dialogue continued—and Modi held several telephone conversations with Trump—trade negotiations stalled when New Delhi refused to open its agricultural market and rejected Donald Trump's role as mediator in the crisis with Pakistan. Added to this were gestures of high symbolic impact: Trump described the Indian economy as a 'dead economy' and received general Munir, the head of the Pakistani army, with honours following a serious attack in Kashmir. In India, these episodes were interpreted as a worrying sign of a loss of centrality in Washington's priorities.

Despite this hardening of political rhetoric, cooperation on defence, security and technology has continued to advance. The visit to the United States by Foreign Minister S. Jaishankar and the Chief of the Indian Navy confirmed the continued existence of channels of dialogue (GK Today, 2026). Although the Quad leaders' summit has been postponed, the framework has maintained its relevance through technical meetings and working groups focused on terrorism, artificial intelligence and supply chains, reflecting a shared commitment to preserving avenues for cooperation even within a more strained bilateral context.

Finally, Donald Trump's statements in February, announcing that the United States would reduce tariffs to 18% in exchange for India limiting its purchases of Russian oil, appear to have put the bilateral relationship back on track. However, in the absence of the text of the agreement, it is difficult to determine the commitments made by Modi. Nor can it be ruled out that the trade agreement signed by India and the European Union in January may have influenced the Trump administration's decision to settle this matter.

On the economic front, there were fears that US tariffs would jeopardise India's narrative as a manufacturing alternative to China, and a potential beneficiary of the 'China+1' strategy[1]. However, the impact was less than expected. The economy showed remarkable resilience and estimated growth for 2025–2026 reached 7.4%, even exceeding the range projected by the government itself. This performance was underpinned by a combination of domestic reforms in the fiscal, labour and investment spheres, which cushioned the impact of external pressures and bolstered confidence in the country's growth trajectory (Nikkei Asia, 2026).

Similarly, Narendra Modi's administration has driven a gradual opening of the Indian economy which, in relations with the European Union, culminated in the signing of a historic free trade agreement in early 2026. This treaty joins those already concluded

[1] 'China+1' (or China plus one) is a trade policy that involves *maintaining operations in China*, but diversifying part of production, investment or the supply chain to *another additional country* ('+1') in order to reduce risks.

with Australia, the United Arab Emirates and the United Kingdom. Although negotiations began in 2007, were suspended in 2013 and resumed in 2022, the tariff pressure exerted by President Trump has acted as a catalyst and accelerated their conclusion: the EU waived certain environmental requirements that were hindering the negotiations and avoided venturing into controversial regulatory areas. In addition to the trade agreement—still pending ratification by the Council and the European Parliament, as well as the Indian Parliament—both parties agreed on a partnership in defence and security, placing the bilateral relationship on a long-term strategic cooperation trajectory.

At the regional level, 2025 proved to be the principal source of instability for India. Relations with Pakistan deteriorated sharply once again following an attack in Indian-administered Kashmir that killed twenty-six civilians and which New Delhi attributed to armed groups supported from Pakistani territory. The response was swift and deliberately calibrated: temporary suspension of the Indus Waters Treaty, closure of border crossings, partial withdrawal of diplomatic personnel and restrictions on the visa regime. In May, the so-called Operation Sindoor raised the level of confrontation through a large-scale night-time air operation—involving more than a hundred aircraft—which included strikes against infrastructure identified by India as terrorist camps and military targets in Pakistan.

Although a ceasefire was subsequently reached, accompanied by the exchange of prisoners and the resumption of commercial flights, the episode once again highlighted the fragility of the security balance in South Asia. China's indirect involvement (Shah and Patel, 2025)—through its political backing and the supply of J-10C fighter jets to Islamabad—added a further layer of concern for New Delhi.

There was also a deterioration on the eastern flank. Relations with Bangladesh took an unexpected turn following the fall of Sheikh Hasina's government and the prime minister's flight to India. Her interim successor, Nobel laureate Muhammad Yunus, has initiated a policy of closer ties with Islamabad and Beijing, including talks on the purchase of JF-17 fighter jets, co-produced with China (Sayeed, 2026). This agreement could mark a turning point in relations with Bangladesh, which has traditionally been closer to India.

Conversely, one of the most significant moves has been the rapprochement with Afghanistan. The visit by the Taliban's Foreign

Minister, Amir Khan Muttaqi, and the announcement that the Indian diplomatic office in Kabul would be upgraded to embassy status (Bajpaee, 2025), could help New Delhi contain Pakistan's influence, although the very nature of the Afghan landscape—historically conflict-ridden and with established alliances—limits the room for manoeuvre.

Aware of the Sino-Pakistani convergence against its regional interests, India began to explore indirect avenues of compensation. One of the most revealing has been the strengthening of its economic and technological ties with Taiwan, which has become a discreet but increasingly significant partner. In 2024, bilateral trade exceeded ten billion dollars for the first time (D'Souza, 2025) and, within a few months, key agreements were concluded on semiconductors, artificial intelligence and supply chains, in line with the Act East and Make in India initiatives. Although New Delhi does not formally recognise Taipei, the intensity and depth of these exchanges suggest a relationship managed, in practice, as if it were a sovereign state. At the same time, they reflect a clear interest in preserving the *status quo* in the Taiwan Strait, given that any disruption would entail high economic and technological costs for India.

In parallel, New Delhi has maintained its relationship with Russia, even in the face of sustained pressure from Western powers following the war in Ukraine. This stance reflects a careful calculation. On the one hand, India has begun to seek alternatives that will enable it to reduce its technological and military dependence on Moscow, opting for greater diversification of suppliers in defence and energy, a trend that is expected to take hold from 2026 onwards. On the other hand, the ratification of the Reciprocal Exchange of Logistics Agreement (RELOS) has enabled a high level of operational cooperation to be maintained, by facilitating mutual access to naval facilities and airspace and providing greater flexibility in joint exercises and regional deployments (Divya A, 2025), including the *Zapad* exercises with Russia and Belarus simulating a war with NATO countries in September 2025.

The underlying reasons remain significant. Over 60% of India's arsenal is of Russian or Soviet origin; Moscow has for decades been a key diplomatic ally in the UN Security Council, particularly on issues relating to Kashmir, and the growing rapprochement between Vladimir Putin and Xi Jinping introduces an additional factor of caution for New Delhi. In this context, the relationship with Russia is not driven by ideological affinity or an unqualified long-term commitment, but by the need to manage strategic legacies whilst building viable alternatives.

3.2 India-United Arab Emirates: shared vision

In 2025, India and the United Arab Emirates translated their sustained rapprochement into concrete results. Aligned on platforms such as the I2U2 (India-Israel-UAE-US) and the India-Middle East-Europe Economic Corridor, both countries have built their relationship on the Comprehensive Economic Partnership Agreement (CEPA), signed in 2022. A year later, bilateral trade reached USD 88 billion, making the UAE India's third-largest trading partner and fourth-largest investor (Gupta and Joshi, 2025). Beyond the figures, the relationship is underpinned by a clear convergence of priorities: economic diversification, human capital, technology and multilateral cooperation.

The holding in December of the 16th India-UAE Joint Commission and the 5th Bilateral Strategic Dialogue, co-chaired by Foreign Ministers *S.* Jaishankar and Sheikh Abdullah bin Zayed Al Nahyan, marked this new phase. At these meetings, both sides adopted an 'action-oriented' *agenda* (Ani, 2025), with an emphasis on areas such as non-oil trade, defence, connectivity, technological innovation and nuclear energy.

The energy chapter featured prominently. The 14-year agreement between ADNOC Gas and the Indian Oil Corporation, which guarantees the annual supply of 1.2 million metric tonnes of liquefied natural gas, will enable India to diversify its energy sources and reduce its dependence on traditional suppliers, such as Russia (Calabrese, 2025). Added to this is cooperation on nuclear energy (Kumar, 2025): the UAE, which already generate a quarter of their electricity from this source, have found in India a partner willing to advance decarbonisation through applied science, innovation and knowledge transfer.

The digital dimension will reinforce this framework. The UAE-India Internet Corridor will facilitate cross-border data flows and stimulate digital trade. Following this trend, both countries are advancing regulatory convergence in areas such as artificial intelligence and the Internet of Things. In parallel, they have begun to conduct around 10% of their bilateral transactions in local currencies, reducing exposure to the dollar and gaining financial leeway (Kumar, 2025).

The Indian diaspora constitutes a structural pillar of this relationship. With over 3.5 million people, it is the largest expatriate community in the UAE and contributes USD 21.6 billion in remittances—19.2% of the total received by India—acting as a permanent economic and social link.

Security cooperation materialised through the joint participation of India and the UAE, alongside France, in naval exercises in the Arabian Sea, strengthening interoperability and the protection of key areas in the Indo-Pacific.

This process overlaps with the modernisation of India's defence capabilities. In 2025, the acquisition of weaponry worth some USD 9.5 billion was approved (Pandey, 2026). Notably, the Barak-8 missile systems, developed jointly with Israel, which have established themselves as the cornerstone of medium-range air defence. The decision is rooted in a dual perception of vulnerability: the persistence of clashes along the border with China and the ever-present possibility of an aerial escalation with Pakistan. This defensive drive has had a maritime counterpart in the parliamentary presentation of the *Report on the Indian Ocean*, coordinated by MP Shashi Tharoor. The document sets out a coherent vision: expansion of the naval presence, strengthening of anti-submarine capabilities and the affirmation of India as a normative benchmark in maritime sustainability.

In conclusion, by 2025, India found itself needing to adjust its foreign policy in the face of an increasingly volatile environment. Disagreements with the Trump administration on trade matters contrasted with the continuation of strategic dialogue, particularly on defence. Relations with Pakistan deteriorated once again following a serious attack in Kashmir, whilst China's indirect support for Islamabad reaffirmed the convergence between the two neighbours against Indian interests.

Faced with these challenges, India adopted a flexible adaptation strategy: it maintained its partnership with Russia, albeit with signs of technical distancing, and deepened its economic and technological ties with the United Arab Emirates, the European Union, Japan and Taiwan, thereby expanding its network of partners without relying exclusively on any one of them.

India's foreign policy in 2025 did not feature abrupt ruptures or dramatic shifts, but rather a pragmatic management of multiple tensions. For 2026, the challenge will be to sustain this agility.

4 United Arab Emirates: a connecting economy

In recent years, the United Arab Emirates has asserted its status as an intermediary actor with growing influence in the Middle East, through an active, pragmatic and highly specialised foreign policy. In an unstable regional environment, the country has consolidated itself as a pivotal economy between Asia, Africa and Europe, drawing on its location, financial muscle and a sustained diversification strategy.

Although energy continues to play a central role, the UAE has integrated it into a broader agenda focused on high-impact sectors, such as technological innovation, artificial intelligence, renewable energy, culture and sport. This sectoral focus responds both to industrial modernisation and to the quest for greater autonomy within a fragmented international system, and is linked to initiatives such as the Abraham Accords, the I2U2 group—alongside India, Israel and the United States—and the India-Middle East-Europe Economic Corridor, designed to strengthen interregional connectivity.

4.1 Niche diplomacy

The defining feature of the UAE's foreign policy has been the institutionalisation of *niche diplomacy* (Chaziza and Lutmar, 2025), which has enabled it to extend its influence beyond its actual weight and to construct an international identity aligned with contemporary narratives of global governance. Without altering its autocratic domestic political structure, the UAE has promoted an image of modernity, efficiency and openness, integrating itself with remarkable effectiveness into normative networks traditionally dominated by liberal democracies and demonstrating the adaptability of this model to a non-democratic regime.

From a multilateral perspective, the United Arab Emirates has pursued a deliberate diversification of alliances, avoiding exclusive dependencies on Washington or Beijing and prioritising flexible cooperation frameworks with multiple partners. This approach has gained prominence following Donald Trump's return to the US presidency (Al Ketbi, 2025b). In this context, the UAE has viewed the reconfiguration of value chains as an opportunity to strengthen its economic resilience, attract investment and establish itself as a hub linking different blocs (Al Ketbi, 2025a).

Relations with the United States have deepened through a shift from an energy-focused agenda towards areas such as artificial intelligence, cybersecurity and digital infrastructure. The presidential visits of 2025 consolidated this transition, resulting in an investment roadmap estimated at 1.4 quintillion dollars, which includes the construction in Abu Dhabi of the largest data centre complex outside US territory. This project has positioned the UAE as Washington's priority technology partner in the Middle East. At the same time, the rapprochement with the European Union—formalised in April 2025 with the start of negotiations for a free trade agreement—reinforces this diversification strategy (European Commission, 2025b). The process, aligned with the 2022 EU-Gulf Strategic Partnership and the 2024 EU-GCC summit, aims to liberalise trade, expand digital exchange and cooperate in critical sectors, laying the foundations for a potential regional trade framework.

At the same time, the United Arab Emirates has strengthened its bilateral cooperation with key European partners as part of its diversification strategy. In February 2025, they signed a USD 40 billion investment agreement with Italy (Rahman, 2025), targeting sectors such as energy, infrastructure, technology and defence, complemented by more than forty agreements covering areas including civil aviation, agriculture, water management, education, SMEs, artificial intelligence and health, as well as a commitment to expand cooperation with third partners, particularly in Africa. During the same period, relations with France were deepened through a convergence centred on artificial intelligence: the Mohamed bin Zayed University for Artificial Intelligence established an academic partnership with a Parisian institution, and both governments agreed to build Europe's largest artificial intelligence centre in France, with an investment of up to fifty billion euros. Taken together, these initiatives consolidate the UAE as a key European partner in the digital and energy transition, strengthening its integration into high-value-added economic and technological networks.

In line with this projection, the United Arab Emirates has adopted a more assertive and autonomous foreign policy approach, particularly evident in the Middle East and Africa, guided by a clear ideological agenda: to contain the expansion of political Islam and, in particular, the influence of the Muslim Brotherhood, perceived as a direct threat to the state model promoted by Abu Dhabi. This orientation is clearly reflected in Yemen (Saba, 2025), where, despite the formal withdrawal of troops in 2019, the UAE maintains significant influence through the Southern Transitional Council as a counterweight to the Islah party, linked to the Brotherhood, which has generated friction with Saudi Arabia and exposed tensions between allies. The same pattern is observed in the sustained backing of Abdel Fattah al-Sisi's Egyptian government since 2013 and in the adoption of firm stances towards actors it considers allies of political Islamism, such as Turkey and Qatar, including support for the boycott against the latter in 2017 and opposition to Turkish influence in Libya. In Africa, the UAE has expanded its presence through a combination of infrastructure investment, military cooperation and support for local actors in countries such as Sudan, Chad and Somaliland, where the development of strategic ports and a security presence have consolidated its influence in the Horn of Africa and strengthened its capacity for intervention in a key area of regional competition.

Overall, the United Arab Emirates' foreign policy functions as an instrument for shaping the regional environment according to a vision of order based on centralised authority, an orientation towards secularism and the containment of transnational political Islam, increasing their involvement in highly conflictual regional settings. Throughout 2025, this approach translated into a pragmatic practice aimed at maintaining flexible alignments, avoiding unilateral dependencies and using the technological economy as a vector of power projection, reinforcing the UAE's ambition to establish themselves as a global node in this sector. Looking ahead to 2026, the challenge lies not only in preserving this position, but also in determining the extent to which they can shape a regional environment in competition with other actors, such as Saudi Arabia. Added to this is an unforeseen scenario: the war with Iran has radically transformed the UAE's public diplomacy in a matter of weeks. Abu Dhabi, which had opted for a cautious détente with Tehran, has been pushed closer to the positions of the United States and Israel than it would have wished following the Iranian attacks on its territory. Regardless of the war's duration and outcome, in terms of image, Abu Dhabi's main challenge will be to preserve its reputation as a stable and secure environment for investors and residents, which has been called into question by the attacks.

5 Brazil's active non-alignment

The return of Luiz Inácio Lula da Silva to the Brazilian presidency in January 2023 marked a significant shift in the country's international profile. Under the slogan 'Brazil is back'— which echoed

US President Joe Biden's 'America is back'— Lula signalled not only a symbolic break with the international isolation pursued during Jair Bolsonaro's government, but also a clear desire to reposition Brazil as an influential player in global governance.

Since then, Brazilian foreign policy has been guided by the traditional principles of its diplomacy: multilateralism, adherence to international law, South-South cooperation and environmental leadership. In this sphere, Brazil has regained visibility on the international climate agenda. The designation of Belém as the host city for COP30 in 2025 and the proposal for the Tropical Forests Forever Facility (TFFF) (Galarraga, 2025) serve both as instruments for the protection of the Amazon and ecological transition, and as mechanisms for building reputation in a context marked by environmental urgency.

Similarly, the government has promoted Brazil's active return to the main regional and multilateral forums. The revitalisation of bodies such as CELAC and UNASUR reflects an effort to rebuild Latin American integration, while Brazil's presidency of the G20 in 2024, the organisation of COP30 and the BRICS+ summit in Rio de Janeiro have served as platforms to project an image of leadership of the Global South and of support for a more plural international order (Ayuso and Gratius, 2024).

This repositioning is embedded in an orientation aligned with Active Non-Alignment (ANA), a contemporary adaptation of the legacy of the Non-Aligned Movement to a scenario characterised by the shift of the economic axis towards the Asia-Pacific, the expansion of South–South trade and the intensification of rivalry between the United States and China (Heine, 2025). Far from passive neutrality, this approach prioritises flexibility and case-by-case assessment, rejecting automatic alignments and promoting active participation in the redefinition of the global architecture. In this context, financial institutions such as the New Development Bank and the Asian Infrastructure Investment Bank are offering alternatives to the traditional financial system.

However, these developments coexist with internal tensions that mark the margins of Brazilian foreign policy. On the energy front, the sustained expansion of the oil sector - which has consolidated Brazil as Latin America's main producer since 2023 - and its accession to OPEC+ stand in contrast to the government's climate discourse, highlighting the difficulty of reconciling economic growth. energy transition and environmental responsibility, especially on the eve of COP30. A similar tension runs through the BRICS+: the incorporation of major hydrocarbon producers has expanded the bloc's weight, but deepened its internal contradictions and weakened the coherence of its agenda.

5.1 Strategic contradictions and internal dilemmas

However, these advances coexist with contradictions that reveal a gap between rhetoric and practice. In the field of human rights, Brazil's position has been questioned: while Lula has defended democracy in Brazil, he has avoided clear statements regarding violations in authoritarian regimes such as Venezuela or Nicaragua.

Similarly, the economic-energy sphere is marked by a duality between a 'green' narrative and a policy of hydrocarbon exploitation. The fact that in 2023 Brazil established itself as the leading oil producer in Latin America, with sustained growth in 2024 and 2025[2], reveals the difficulty of reconciling economic development, sustainability and environmental responsibility.

In the context of BRICS+, the inclusion of countries with significant oil reserves such as Iran, Saudi Arabia and the United Arab Emirates has raised the bloc's profile, but has also exacerbated its internal contradictions, making it difficult to build a common agenda.

5.2 Balancing China and the United States

One of the most delicate aspects of Brazilian foreign policy has been navigating the growing tension between the United States and China, with both of which it maintains significant strategic and economic ties. Over the last decade, China has gained ground as the country's main trading partner, driven by sustained demand for Brazilian raw materials such as soya, minerals and oil. This relationship has deepened through investments in infrastructure, technology and energy, as well as through agreements in emerging areas such as artificial intelligence and semiconductors. However, this asymmetrical relationship has raised concerns about its potential to perpetuate an economic model based on the

[2] This expansion included its accession to the OPEC+ group, with the aim of participating in strategic debates on the global market, despite criticism from environmentalist groups for contradicting its climate rhetoric (Ayuso and Gratius, 2024).

export of resources without sufficient added value, which could limit Brazil's industrial development (Stuenkel, 2025).

In response, the government has launched initiatives aimed at transforming the country's productive matrix. Among these, the National Energy Transition Policy, presented in 2024, stands out; it seeks to reduce dependence on raw materials and position Brazil as a key player in the global green economy.

The search for a balance of interests has been evident in decisions such as the conditional authorisation granted to Huawei to participate in the roll-out of 5G and the refusal to formally join the Belt and Road Initiative. At the same time, the unilateral measures adopted in 2025 by Donald Trump—including 50% tariffs— have reinforced the perception of vulnerability and encouraged greater diversification of alliances with the European Union, India and other emerging economies.

Faced with the limitations of BRICS+ as a heterogeneous bloc—exacerbated by the inclusion of members with authoritarian regimes and divergent priorities (Sabatini, 2025)—Brazil has opted to strengthen bilateral alliances based on shared values and interests. Lula's visit to Japan in March 2025 exemplifies this approach. As part of this initiative, more than eighty agreements were signed, including the Action Plan for the Strategic and Global Partnership (2025–2030), focused on sustainability, science, technology and innovation (Government of Brazil, 2025). Notable commitments include those on fuels, bioenergy, the restoration of degraded land and water management, as well as the aim to expand bilateral trade beyond seventeen billion dollars and to institutionalise biannual presidential meetings.

In summary, Lula's return has revitalised Brazil's international presence through a combination of environmental leadership, South-South cooperation and advocacy for reform of the global order. However, tensions persist between rhetoric and practice, particularly on environmental and human rights domains, as well as the challenge of navigating an increasingly intense rivalry between major powers, especially following the return of Donald Trump and his new National Security Strategy, aimed at curbing Chinese influence in the Western Hemisphere. The recent intervention in Venezuela and manoeuvres in Argentina and Panama indicate that the region will face greater pressures. How Brazil manages these contradictions will be decisive in assessing the solidity and sustainability of its renewed international standing.

Bibliography

Al Ketbi, E. (2025a). *The UAE and Italy: Deepening Strategic Partnership in a Turbulent International Landscape* [online]. Emirates Policy Centre. [Accessed: 2025]. Available at: https://epc.ae/en/details/brief/the-uae-and-italy-deepening-strategic-partnership-in-a-turbulent-international-landscape

—. (2025b). The UAE siding with globalisation is a strategic gain for the country [online]. *The National News*. [Accessed: 2025]. Available at: https://www.thenationalnews.com/opinion/comment/2025/04/10/trump-tariffs-uae-globalisation-cepa/

Ani. (2025). India, UAE agree on new action-oriented agenda to deepen strategic partnership [online]. *The Tribune*. [Accessed: 2025]. Available at: https://www.tribuneindia.com/news/world/india-uae-agree-on-new-action-oriented-agenda-to-deepen-strategic-partnership/

Ayuso, A. and Gratius, S. (2024). Lula's international project for Brazil: a balancing act between the Global South and the Atlantic North [online]. *International Notes*. 301. CIDOB. [Accessed: 2025]. Available at: https://www.cidob.org/publicaciones/proyecto-internacional-del-brasil-lula-juego-equilibrios-entre-sur-global-norte.

Bajpaee, C. (2025). India seeking to reset relations with the Taliban: can rapprochement last? [online]. Chatham House. [Accessed: 2025]. Available at: https://www.chathamhouse.org/2025/10/india-seeking-reset-relations-taliban-can-rapprochement-last

Calabrese, J. (2025). What India-UAE ties reveal about a changing global order [online]. *Gulf International Forum*. [Accessed: 2025]. Available at: https://gulfif.org/what-india-uae-ties-reveal-about-a-changing-global-order/

Chaziza, M. and Lutmar, C. (2025). The UAE's niche diplomacy in the Middle East: authoritarian strategies of a middle power [online]. *Global Security: Health, Science and Policy*. 10(1). DOI: 10.1080/23779497.2025.2577421

Divya A. (2025). Explained: India-Russia logistics agreement, with an eye on the Arctic and the Indo-Pacific [online]. *The Indian Express*. [Accessed: 2025]. Available at: https://indianexpress.com/article/explained/india-russia-logistics-agreement-with-eye-on-arctic-indo-pacific-10427803/

D’Souza, S. M. (2025). Leveraging Taiwan in India’s strategic counterbalance to China [online]. *The Interpreter*. [Accessed: 2025]. Available at: https://www.lowyinstitute.org/the-interpreter/leveraging-taiwan-india-s-strategic-counterbalance-china

Eldon, S. (2025). Indo-Pacific security demands a strong India-Japan relationship [online]. *The Print*. [Accessed: 2025]. Available at: https://theprint.in/opinion/indo-pacific-security-india-japan/2806329/

European Commission. (2025a). *The EU and Japan launch Competitiveness Alliance at bilateral summit in Tokyo* [online]. European Commission. [Accessed: 2026]. Available at: https://ec.europa.eu/commission/presscorner/detail/en/ac_25_1908

—. (2025b). *EU-United Arab Emirates Free Trade Agreement* [online]. European Commission. [Accessed: 2026]. Available at: https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/gulf-region/eu-united-arab-emirates-agreement_en

Galarraga Gortázar, N. (2025). Brazil joins the green capitalism movement with a fund to invest in the protection of tropical forests [online]. *El País*. [Accessed in 2025]. Available at: https://elpais.com/america/2025-11-07/brasil-se-apunta-al-capitalismo-verde-con-un-fondo-para-invertir-en-la-proteccion-de-los-bosques-tropicales.html

Gk Today. (2026). Explained: Why India-US Ties Are Holding Firm in 2025 Despite Political Strains [online]. *GK Today*. [Accessed: 2026]. Available at: https://www.gktoday.in/explained-why-india-us-ties-are-holding-firm-in-2025-despite-political-strains/

Government of Brazil. (2025). Lula: ‘Brazil-Japan relationship reaches new dimension’ [online]. Government of Brazil. [Accessed: 2025]. Available at: https://www.gov.br/planalto/en/latest-news/2025/03/lula-201cbrazil-japan-relationship-reaches-new-dimension201d

Grano, S. A. and Huang, D. W. F. (eds.). (2023). *China–US competition: impact on small and middle powers’ strategic choices* [online]. Cham, Springer International Publishing AG. [Accessed: 2025]. Available at: https://ebookcentral.proquest.com/lib/universidadcomplutense-ebooks/detail.action?docID=7166073

Gupta, P. and Joshi, D. (2023). India and the UAE: CEPA cements a promising bilateral relationship [online]. Observer Research Foundation. [Accessed: 2025]. Available at: https://www.orfonline.org/expert-speak/india-and-the-uae-cepa-cements-a-promising-bilateral

Heine, J. (2025). Brazil, the BRICS and Active Non-Alignment: The Country Chairs the Group in 2025 [online]. *CEBRI-Journal*. 4 (13). [Accessed: 2025]. Available at: https://cebri.org/revista/en/artigo/202/brazil-the-brics-and-active-non-alignment

Jordaan, E. (2003). The concept of a middle power in international relations: distinguishing between emerging and traditional middle powers. *Politikon*. 30(1), pp. 165–181. DOI: 10.1080/0258934032000147282

Kanodia, K. (2025). Securing the future: US-Japan-South Korea cooperation [online]. Chatham House. [Accessed: 2025]. Available at: https://www.chathamhouse.org/2025/12/securing-future-us-japan-south-korea-cooperation

Kumar, V. (2025). India-UAE Partnership Eyes Nuclear Energy and Advanced Technology as Next Breakthrough Sectors [online]. *DD News*. [Accessed: 2025]. Available at: https://ddnews.gov.in/en/india-uae-partnership-eyes-nuclear-energy-and-advanced-technology-as-next-breakthrough-sectors/?noshow=1

Laurence, M. (2023). Middle Powers. Oxford Research Encyclopedia of International Studies [online]. *Oxford Research Encyclopedia of International Studies*. [Accessed: 15 January 2026]. Available at: https://oxfordre.com/internationalstudies/view/10.1093/acrefore/9780190846626.001.0001/acrefore-9780190846626-e-783

Madan, T. (2026). How to Survive in a Multialigned World: The Indian Way of Strategic Diversification [online]. *Foreign Affairs.* [Accessed: 2026] Available at: https://www.foreignaffairs.com/india/how-survive-multialigned-world-tanvi-madan

Nikkei Asia. (2026). India expects 7.4% economic growth for 2025-26, defying US tariffs [online]. *Nikkei Asia.* [Accessed: 2026]. Available at: https://asia.nikkei.com/economy/trade-war/trump-tariffs/india-expects-7.4-economic-growth-for-2025-26-defying-us-tariffs

Pandey, A. (2026). Rs 79,000 crore defence push: How India is rearming to counter China and Pakistan [online]. *The Times of India*. [Accessed: 2026]. Available at: https://timesofindia.

indiatimes.com/india/from-barak-8-to-kamikaze-drones-what-indias-rs-79000-crore-defence-clearance-signals-about-future-wars-rearming-for-conflicts-with-china-and-pakistan/articleshow/126350189.cms

Prime Minister's Office of Japan. (2025). Policy Speech by Prime Minister TAKAICHI Sanae to the 219th Session of the Diet [online]. Prime Minister's Office of Japan. [Accessed: 2025]. Available at: https://japan.kantei.go.jp/104/statement/202510/24shoshinhyomei.html

Rahman, F. (2025). UAE to invest $40bn in Italy across sectors such as energy and AI [online]. *The National News*. [Accessed: 2025]. Available at: https://www.thenationalnews.com/business/economy/2025/02/24/uae-to-invest-40-billion-in-italy-across-sectors-such-as-energy-and-ai/

Saba, Y. (2025). UAE foreign policy in spotlight after Yemen escalation [online]. *Reuters*. [Accessed: 2025]. Available at: https://www.reuters.com/world/middle-east/uae-foreign-policy-spotlight-after-yemen-escalation-2025-12-31/

Sabatini, C. (2025). Brazil's BRICS agenda may be hard to accomplish after the Iran–Israel war [online]. *Chatham House*. [Accessed: 2025]. Available at: https://www.chathamhouse.org/2025/07/brazils-brics-agenda-may-be-hard-accomplish-after-iran-israel-war

Sayeed, S. (2026). Pakistan eyes defence pact with Bangladesh, sale of JF-17 jets [online]. *Reuters*. [Accessed: 2026]. Available at: https://www.reuters.com/world/asia-pacific/pakistan-eyes-defence-pact-with-bangladesh-sale-jf-17-jets-2026-01-07/

Shah, S. and Patel, S. (2025). How Pakistan shot down India's cutting-edge fighter using Chinese gear [online]. *Reuters*. [Accessed: 2025]. Available at: https://www.reuters.com/business/aerospace-defense/how-pakistan-shot-down-indias-cutting-edge-fighter-using-chinese-gear-2025-08-02/

Stuenkel, O. (2025). *Multi-Alignment as Strategy: How Brazil Navigates Between Washington, Beijing, and the Global South* [online]. Belfer Center for Science and International Affairs, Harvard Kennedy School. [Accessed: 2025]. Available at: https://www.belfercenter.org/research-analysis/multi-alignment-strategy-how-brazil-navigates-between-washington-beijing-and

Sugiyama, S. and Komiya, K. (2026). Japan condemns China's dual-use export ban as rare earth curbs loom [online]. *Reuters*.

[Accessed: 2026]. Available at: https://www.reuters.com/world/asia-pacific/japan-says-chinas-dual-use-export-ban-unacceptable-rare-earths-crosshairs-2026-01-07/

Yamazaki, M. (2026). Japan seeks power to order divestment of foreign acquisitions [online]. *Reuters*. [Accessed: 2026]. Available at: https://www.reuters.com/sustainability/boards-policy-regulation/japan-seeks-power-order-divestment-foreign-acquisitions-2026-01-07/

Chapter Four

The People's Republic of China and the intensification of its hybrid strategy in Taiwan: doctrine, practices and implications for the European Union

Inés Arco Escriche

Abstract

This article analyses the intensification of the People's Republic of China's hybrid tactics and their growing relevance in the Taiwanese context, with the aim of altering the *status quo* without triggering an open conflict. Firstly, an overview is provided based on the evolution of Chinese military doctrine in relation to the concepts of hybrid conflict and its equivalents—such as the doctrine of the three wars or cognitive dominance operations. Next, the Taiwanese case is analysed, examining the growing use of coercive military manoeuvres, disinformation operations, cyberattacks, legal warfare tactics and economic instruments—whether used as incentives or punitive measures—as well as Taiwan's responses. Finally, the implications for Europe are explored, where Chinese hybrid threats pose growing challenges to democratic resilience and security. The Taiwanese case thus emerges as a laboratory for understanding the contemporary nature of hybrid threats to democratic systems.

Keywords

China, Hybrid threats, Disinformation, Taiwan, Three wars.

Introduction

Beijing closed 2025 with two days of military, drills around the island of Taiwan under the name 'Justice Mission 2025'. These manoeuvres simulated a blockade operation, encircling and controlling the island's maritime and airspace, demonstrating the People's Republic of China's (PRC) ability to assert its sovereignty over the strait and isolate the Republic of China (hereafter, Taiwan) internationally without the need for a direct invasion.

On December 29th, 2025, during the first day of these exercises, the ultra-nationalist Chinese newspaper *Global Times* published a report stating that the Chinese Coast Guard (CCG) was going to blockade the ports of Keelung (north), Tainan, Kaohsiung (south) and Hualien (east) in Taiwan. After several Taiwanese newspapers picked up the story, the non-governmental organisation Taiwan FactCheck Center issued a statement debunking the news (Qiu, 2025). In April 2025, also during another round of Chinese military drills in the strait, similar hoaxes regarding the blocking of natural gas imports to the island or the proximity of Chinese vessels to the Taiwanese coast were similarly circulated and debunked (Li, 2025). These examples demonstrate how, increasingly, Chinese military exercises are not only focused on kinetic aspects, but are accompanied by hybrid threats, such as disinformation, which seek to divide and manipulate public opinion, erode Taiwanese resistance and gain support within the island.

Beyond key moments of tension, the use of disinformation by Chinese actors has become ubiquitous in Taiwan. According to data published by the Taiwanese National Security Bureau (2026), in 2025 more than 2.3 million cases of disinformation were recorded on the island, an upward trend resulting from the increased cognitive pressure exerted by Beijing. Likewise, the use of other Chinese hybrid tactics against Taiwan has also increased, with more than 2.63 million cyberattacks on critical infrastructure per day in 2025 (Lee, 2026) and more than 4,000 air incursions into the Air Defence Identification Zone (ADIZ) that same year (Taiwan Plus, 2025). All these operations share a single objective: to increase coercion to destabilise the island without triggering an open conflict, blurring the lines between war and peace.

Taiwan, considered one of the PRC's core interests, has become a testing ground for Chinese hybrid aggression (Aukia, 2023). Monaghan (2019: 87) defines hybrid threats as 'a wide range of non-violent methods targeting vulnerabilities across society to undermine the functioning, unity, or will of their targets, whilst degrading and subverting the status quo'. Speaking of hybrid tactics rather than hybrid conflicts places the emphasis on everything that occurs outside an open armed conflict, including aspects such as diplomacy, the threat of military force, the economy, the law, the manipulation of information, or cyberattacks, capable of promoting a political agenda and objectives without resorting to force. This concept differs from the 'grey zone', a term more commonly used in the American and Japanese contexts. According to Mumford and Carlucci (2022: 197), the 'grey zone' defines the space of competition without open conflict, whilst hybrid tactics would be actions falling short of conflict that help an actor achieve their objectives gradually, whilst also reducing the capacity for a direct response.

Thus, Taiwan serves as a testing ground for understanding Chinese hybrid tactics, particularly as their use is on the rise worldwide. Domestic developments on the island are not merely a regional matter, but a testing ground for refining tactics of disinformation, economic pressure, military intimidation and cognitive manipulation that China subsequently exports globally, including to Europe. While Brussels has understandably focused on Russian threats, analysing how Taiwan has developed resilience to these threats allows us to anticipate and prepare for challenges that will intensify as China's strategic presence in our neighbourhood continues to expand.

This article analyses the growing challenge posed by China's use of hybrid tactics, particularly in Taiwan. First, it contextualises how Chinese analysts understand and define hybrid threats and how these differ from other perspectives, such as the Russian one. Secondly, it conducts a systematic analysis of how China employs these tactics in the Taiwan Strait, with an emphasis on long-standing challenges and new developments over the past year. Finally, it concludes with the implications for Europe and the existing mechanisms for countering Chinese hybrid threats.

1 Hybrid tactics with Chinese characteristics: definition, literature and differences with Russia

1.1 The Chinese perspective on hybrid warfare

The terminology of 'hybrid conflicts' and the 'grey zone' did not appear in Chinese strategic discussions until 2014, when it was imported from Western and Japanese debates (Lin, 2022: 11). Consequently, the dominant concern in Chinese literature has centred on the use of these tactics by its main rival, the United States, and on the development of defensive capabilities against them. For Chinese analysts, the origin of hybrid conflicts lies in Washington, through its 'military operations, colour revolutions, regime change and defence documents, in countries such as the former Czechoslovakia, Iraq, Syria, Iran, Yemen, Libya, Afghanistan, Kosovo, Venezuela and Georgia' (Saalman, 2021: 96). For these authors, Western interest in this phenomenon stems from a shift in the direction of such practices, now that Europe and the United States are victims of these tactics rather than perpetrators.

In these writings, China perceives itself as a victim of US hybrid threats, which include trade wars, export controls, the manipulation of information, the use of espionage software, and the development of artificial intelligence (AI)-guided systems aimed at containing China's development and its military capabilities (Berzina-Cerenkova *et al.*, 2025). Yet, if Washington is the origin, Russia is the master. According to Chinese experts, while both Moscow and Beijing have been victims of US destabilisation and encirclement, Russia has been able to learn from its victimisation and perfect these tactics in Ukraine and Syria.

By contrast, when China is accused of employing these hybrid tactics, its analysts deny any parallels between its actions and hybrid conflicts. However, Ong (2018) identifies two intellectual traditions that codify the hybrid as part of Chinese military strategies. Firstly, the influences of Sun Tzu and his *Art of War* (2019 [5th century BC]) have inspired the continuous pursuit of relative advantage over the adversary, where the use of predictable and unpredictable tactics ultimately confuses, demoralises and, ultimately, deters the enemy from going to war. Secondly, the Maoist tradition of 'people's war', which already integrated propaganda alongside military and civilian capabilities (particularly through militias) and their perpetual mobilisation in both times of peace and war, has been adapted to the current technological context. Thus, both historical and imperial examples against northern invasions, as well as the victory in the Chinese Civil War (Baker, 2015), create a strategic continuum in which ambiguity, the deployment of state and irregular actors, and the fusion of military and non-military methods constitute fundamental doctrinal principles for achieving political objectives.

This vision was formalised in the PLA's 'Three Wars' doctrine in 2003. In 1999, two Chinese colonels, Qiao Liang and Wang Xiangsui, published the work *Unrestricted Warfare*, in which they concluded that military force was no longer sufficient to win conflicts and that, instead, an amalgam of military, political, economic, cultural, diplomatic, informational and cyber tactics was necessary to subdue the enemy. Hence, this new doctrine recognised the need to adapt to new forms of warfare in which public opinion, institutions and legal systems can be instrumentalised. Accordingly, the PLA has focused on developing psychological, media and legal warfare tactics that complement diplomatic, economic and military measures in order to shape a favourable strategic environment (PLA Daily, 2004).

These three domains—public opinion, psychological/cognitive and legal—were further defined in the manual *Science of Military Strategy* (Xiao, 2015), published by the PLA's National Defence University. First, public opinion warfare involves the manipulation of information across multiple channels to shape the will and perceptions of populations, both to improve China's image and to foster internal divisions in third countries. Second, psychological warfare seeks to exacerbate division and a sense of helplessness among populations and political and military elites in order to delay a decisive response. Finally, legal warfare aims to use domestic and international legal frameworks to delegitimise and constrain an adversary while advancing the hybrid actor's interests through legal means. An example is China's interpretation of the subordination of the United Nations Convention on the Law of the Sea to the principle of sovereignty, in order to undermine the Hague arbitration ruling in favour of the Philippines. Thus, this contest based on ideas and perceptions illustrates the extension of competition from traditional domains of land, sea and air into non-material spaces, as well as the need for centralised coordination among multiple actors.

Since the late 2010s, the informational and cyber dimensions have gained prominence in Chinese military analysis under the concept of 'cognitive domain operations'. These operations aim to influence the perception and behaviour of other actors by appealing to emotions and cognitive stimuli. To this end, they draw on cyber aspects—as a channel for spreading disinformation or conducting cyberattacks—and informational aspects—which focus on the form and control of information (Hung and Hung, 2022). Thus, technological advances have reinforced the idea that informational and cyber operations act as a 'force multiplier', both when used in parallel with other kinetic elements—as seen in the introduction regarding the Taiwanese case—and also individually, due to their ability to influence public opinion through social media (Saalman, 2021: 99; Beauchamp-Mustafaga, 2024).

In this regard, the PLA has adopted a dual approach. Offensively, it deploys information attacks to deter, confuse the public and mislead policymakers through coordinated social media campaigns and the use of bots, such as the dissemination of disinformation during military exercises. Defensively, it seeks to maintain a positive image and control narratives about China, with examples such as Chinese media coverage and diplomatic discourse during the Hong Kong protests (2019) or the COVID-19 pandemic. Although no known Chinese doctrine exists yet on how to instrumentalise social media, there is growing debate within Chinese military literature on how to use AI or big data to improve the dissemination of narratives through targeting (Berzina-Cerenkova *et al*., 2025: 40).

Beyond cognitive operations, cyber dominance has also become one of the pillars of Chinese hybrid actions, particularly through cyberattacks, intellectual property theft, and surveillance and espionage, such as in APT campaigns (Saalman, 2021). In parallel, advances in AI and China's technological inferiority *vis-à-vis* the United States have also fostered greater development of asymmetric capabilities, with a particular emphasis on unmanned vehicles and drones, as well as military AI—two areas set to dominate in the future. However, there is still no evidence of their use by the PLA beyond isolated sightings of drones in Taiwan or their use for reconnaissance and monitoring in the South China Sea.

What drives China's preference for hybrid strategies beyond its military tradition? First, growing rivalry with Washington at both regional and international levels, combined with China's military inferiority, encourages the proliferation of hybrid tactics that seek to advance certain objectives through small, repetitive *fait accomplis*, thereby avoiding escalation with the United States and its allies by remaining below the threshold of open aggression (Mazarr *et al.,* 2018), though they also open the door to tensions and clashes that could trigger a conflict. Second, the ambiguity of these measures allows China to signal explicit threats of retaliation to weaker actors—such as Taiwan or other parties in the South China Sea disputes (Insisa, 2023)—while maintaining plausible deniability to limit damage to its international image, although this second point has not been particularly effective. Third, the centralisation of power in China, particularly since Xi Jinping came to power in 2012, enhances the capacity for coordination between different actors—from various ministries to the military and state-owned enterprises—for common purposes, especially on issues of great concern to the regime, such as Taiwan or Hong Kong. Progress towards civil-military integration is also facilitating these tactics, increasing the number of actors involved beyond state entities (Lin, 2022: 33). Finally, technological advances have multiplied and diversified channels and forms of subversion, expanding the scope of action, as well as offering new innovative techniques that allow power to be projected beyond conventional capabilities.

1.2 Learning from the master? Similarities and differences between Russia and China

The Sino-Russian strategic partnership, strengthened since the invasion of Ukraine in 2022, calls for an examination of the lessons learnt, similarities and differences between these two hybrid actors. Since 2014, Beijing has systematically analysed Russian operations in Crimea, disinformation campaigns in Europe and, more recently, both the effective tactics and the costly mistakes made by Russia in Ukraine. Understanding this process of learning, but also of differentiation, is essential to grasping how both actors operate and what lessons emerge in terms of providing a proportionate response to their actions.

To understand Sino-Russian convergences, it is necessary first to examine how Moscow conceptualises hybrid conflict. The Russian concept closest to the Western notion, *gibridnaya voyna*, aligns with the Chinese usage: both interpret it as a Western strategy directed against their respective states. Beyond this terminological usage, the Russian military and strategic community has developed two distinct ways of understanding hybrid conflicts. First, in line with the misnamed Gerasimov doctrine, contemporary conventional warfare must be preceded by a phase of political destabilisation underpinned by the exploitation of social grievances through unconventional methods, as occurred in Crimea. Second, Russian elites have launched a political war against the West without any intention of invasion, but relying on hybrid tactics, such as disinformation or cyberattacks, to 'divide, demoralise and distract' whilst Russia reaffirms its sphere of influence (Galeotti, 2018). From this, one can infer a Sino-Russian consensus regarding the transformation of conventional warfare into hybrid forms, the importance of information as an alternative to open military conflict, and the utility of these techniques in creating division among adversaries.

Russia's invasion of Ukraine in 2022 has demonstrated the growing cooperation and convergence between the two actors. Since the beginning of the war, there has been an increasing amplification of Russian narratives within Chinese disinformation ecosystems, particularly narratives seeking to delegitimise democracy, Western institutions or specific actors such as the United States, although these episodes have been opportunistic in sharing similar objectives of discrediting Washington (EEAS, 2025). However, the cutting of undersea cables in the Baltic and the Taiwan Strait by Chinese and Russian actors demonstrates growing coordination in acts of sabotage.

Nevertheless, there are also significant differences worth highlighting in terms of specific scenarios, tactics and objectives. Firstly, Russian hybrid threats have a longer track record and are more sophisticated in Europe (particularly in Ukraine), in the United States (as exemplified by the interference campaign in the 2016 presidential elections) and in Africa (linked to the presence of the Wagner Group), as well as in Central Asia. In contrast, whilst China is conducting a global campaign aimed at positively shaping global perceptions of its regime, its main theatre of operations remains Taiwan and its neighbourhood, where it has ongoing territorial disputes with Japan and countries in Southeast Asia. Although Brussels has also identified China as a growing threat, it is important to note that there are currently few documented cases of Chinese disinformation and interference in the European context, particularly when compared to Russia (EEAS, 2025; Bleyer-Simon *et al*., 2025). One notable example is 'Operation Paperwall', through which Chinese actors established a network of 123 fake media outlets worldwide (including in Europe) (Alaphilippe, 2024), aimed at creating and amplifying content aligned with Chinese interests.

Second, China demonstrates greater sophistication in the use of hybrid tactics than Russia, exemplified by a more calculated strategy that unfolds over time through incremental measures, where the use of direct force is employed more as an instrument of coercion and deterrence than in the Russian case, which prioritises a more rapid escalation. However, the Russian invasion of Ukraine and Moscow's inability to prevail quickly have influenced the perception of Chinese military elites regarding the effectiveness of emphasising unconventional measures in open conflicts, except for cognitive domain (in this case, successfully applied by Washington and Kyiv) (Wang and Zakheim, 2025).

Third, Beijing prioritises controlling narratives to ensure they are favourable to it, whereas for Moscow, subversion and chaos carry greater weight (Wallis, 2019). In this regard, the European External Action Service report (EEAS, 2025: 20) highlights how China's information infrastructure focuses on reinforcing its narratives on issues sensitive to the regime—such as Xinjiang, Taiwan, Tibet, etc.—in an extremely coordinated, simultaneous and centralised manner, using various state-controlled media outlets and diplomatic figures, supported by Chinese public relations agencies. Russia, by contrast, is capable of a wider reach through multiple simultaneous campaigns serving different geopolitical objectives. However, new decentralised Chinese disinformation tactics are emerging in Japan and Taiwan, based on false and conspiracy-theory content that more closely resembles Russian techniques (Dixon and Beznosiuk, 2025). Thus, tactical cooperation between the two actors and mutual learning—particularly China's observation of Russian operations—suggest a progressive convergence that could intensify in the future.

2 Hybrid tactics in China's neighbourhood: the case of Taiwan

Although international attention regarding a possible military invasion of Taiwan by the PRC has been growing in recent years, this focus may prove limited in understanding the current hybrid dynamics defining this conflict. According to Cui Lei (Cui, 2021), a researcher at a think tank linked to the Chinese Ministry of Foreign Affairs, Beijing's strategy continues to be guided by Sun Tzu's maxim of 'winning without fighting'.

In this context, the Taiwan issue—characterised by contested sovereignty, identity tensions, US military backing and deep economic and social ties with mainland China—has become the prime arena for the deployment of hybrid tactics. Since the beginning of the 21st century, China's reunification strategy has systematically combined conventional military measures with disinformation operations, cyberattacks, economic incentives and manipulation of the legal framework, with the aim of exploiting specific vulnerabilities within Taiwanese society. This combination of coercive and persuasive instruments reflects both the Chinese doctrine of the ‘three wars’ (psychological, media and legal warfare) and the Western conceptualisation of hybrid threats.

It is worth noting that the implementation of this hybrid strategy requires cross-cutting inter-institutional coordination within the chinese state apparatus, involving the Taiwan Affairs Office, the United Front Work Department, the PLA (including the GGC and maritime militias) and the Propaganda Department, amongst other state and civilian actors (Hung and Hung, 2022; Grossman, 2025). This institutional architecture reflects the comprehensive nature of the Chinese strategy, which transcends the purely military sphere to encompass multiple dimensions of state power.

In this context, three phases can be identified in China’s hybrid strategy towards Taiwan, shaped by the preferences of the Beijing leadership, political developments in Taiwan, and the progressive increase in Chinese power and capabilities. The first phase (1995–2008) was characterised by an openly coercive approach involving military and legal pressure, with episodes such as the third Taiwan Strait crisis (1995–1996). This stance moderated significantly with the coming to power of the candidate of the Chinese nationalist party, the Kuomintang (KMT), Ma Ying-jeou (2008–2016), whose willingness to engage with the mainland led to a period of relative détente. However, the election of Tsai Ing-wen in 2016 and her subsequent succession by Lai Ching-te in 2024—both from the Democratic Progressive Party (DPP)—marked the beginning of a third phase characterised by the intensification and diversification of pressure and interference measures. These range from military incursions into taiwanese airspace and maritime territory to economic coercion, disinformation campaigns, cyberattacks and manipulation of the international legal framework. Whilst a comprehensive analysis of these three phases would be impossible within the scope of this article, the following section analyses and highlights the main developments of recent years, as well as the continuity of certain measures since the beginning of this century.

Military measures

Since 2019, China has visibly stepped up its coercion towards Taiwan, when Chinese air force aircraft began routinely crossing Taiwan’s ADIZ without prior communication or authorisation from Taipei. But the visit by Nancy Pelosi, then Speaker of the US House of Representatives, in August 2022 marked a turning point. In response to that visit, Beijing carried out unprecedented military manoeuvres to encircle and blockade Taiwan by sea and air, establishing six control zones around the island—extending extensively into the south and east of the island for the first time—thereby demonstrating for the first time its ability to impose a blockade on the island. Furthermore, the massive deployment of nearly fifty fighter jets violated both the ADIZ and the median line of the Taiwan Strait, an informal boundary that both sides had hitherto respected to avoid escalation. Furthermore, the PLA fired ballistic missiles into Taiwanese airspace for the first time, some of which landed in japanese waters (Grossman, 2025).

At the same time, drones were also sighted near various taiwanese islands for the first time in July and August 2022, before and after Pelosi's visit. Although the incursions continued for several weeks, these were accompanied by disinformation campaigns regarding Taiwan's inability to respond, with the aim of reducing support and fuelling a sense of humiliation among the population (DW, 2022), the shooting down of a civilian drone by the Taiwanese Armed Forces on September 1st, 2022 brought all such deployments to a halt until 2024, when half a dozen incursions were recorded once again (Fan, 2025). Although in some cases these drones have subsequently been attributed to civilians, these activities are characterised by the ambiguity inherent in hybrid threats, where attribution is unclear, but which, in combination with other pressure factors, contribute to generating a sense of insecurity among the Taiwanese population.

Since then, the PLA has conducted similar exercises annually to combat 'Taiwanese separatist forces' (Koh, 2025), progressively normalising this high level of coercion and threat. Notable among these exercises are the two manoeuvres carried out in 2024 as a direct response to high-level political events: President Lai Ching-te's inauguration speech in May of that year, and his subsequent speech on National Day in October. In both cases, the Chinese military encircled the island of Taiwan, as well as the Matsu and Kinmen islands, through the simultaneous deployment of naval and air forces, combined with multiple incursions into Taiwanese airspace. Significantly, these exercises also prominently involved the GGC, which went so far as to conduct operations off the coast of Hualien, in eastern Taiwan, deliberately blurring the distinction between military and paramilitary forces (Grossman, 2025).

However, the most recent of these exercises, held on December 29th and 30th, 2025, has set a new precedent. Unlike the previous ones, which were in response to internal Taiwanese political events, these military drills took place in response to the approval of the largest US arms package for Taiwan, valued at USD 11.1 billion (Hawkins, 2025), and amidst a diplomatic dispute between Beijing and Tokyo, following the confirmation by Japanese Prime Minister Takaichi Sanae of Japan's potential military support for Taiwan in the event of an invasion. This time, the Chinese military imposed eight maritime blockade zones—the largest number to date—specifically aimed at controlling the island's main ports. The manoeuvres involved naval forces (without the participation of aircraft carriers, but which were deployed in 2024 and April 2025), air forces and the Coast Guard, as well as four amphibious assault vessels and the launch of medium-range missiles (Military News Agency, 2025), demonstrating the capabilities required for an invasion of the island. On this occasion, a signal was sent to Tokyo and Washington: under the rhetoric of deterring 'foreign interference', Beijing demonstrated its ability to completely isolate the island from any external support in the initial stages of a conflict. In this way, China manages to progressively reduce Taiwan's strategic space and the sense of threat without resorting to the direct use of force, whilst testing the limits of peace.

Non-military measures: lawfare, economics and disinformation

Whilst military coercive actions constitute a paradigmatic example of operations that blur the lines between war and peace without reaching open conflict, cross-strait relations are increasingly mediated by non-military activities with a clear cognitive component aimed at demoralising and deterring the Taiwanese population.

Firstly, Beijing has deployed multiple tactics of lawfare by establishing domestic legal measures and advancing interpretations of international law designed to define the context of action and the cognitive framework for both Taipei and the international community. These measures pursue three main objectives: to frame relations between Beijing and Taipei as an internal Chinese dispute; to promote the island's international isolation through diplomatic (de)recognition by other states; and to prevent any move towards Taiwanese self-determination (West and Insisa, 2024).

Specifically, the PRC's adoption of the Anti-Secession Law of 2005, at the height of the Taiwanese independence movement under President Chen Shui-bian (2000–2008), established two conditions for justifying the use of force against the island: (1) a formal declaration of independence by Taipei, and (2) the exhaustion of all peaceful means to achieve reunification. Whilst this measure does not legitimise the use of force under international law, it serves as a cognitive deterrent to domestic and international actors by setting out the consequences of any self-determination movement from Taipei, creating the equivalence that any action towards independence would inevitably trigger an armed conflict. The effectiveness of this *lawfare* strategy is evident in data from the Taiwan National Security Survey conducted by Duke University: by the end of 2020 (Duke University, 2020), 61.8% of the Taiwanese population believed that China would attack the island if independence were declared, demonstrating how the Chinese legal framework has shaped perceptions of risk within Taiwanese society.

Secondly, economic measures, both in the form of incentives and through the instrumentalisation of agencies, play a central role in China's hybrid strategy. During the period 2008–2016, relations across the Strait were marked by intense economic integration, with milestones such as the adoption of the Economic Cooperation Framework Agreement in 2010, which reduced tariff barriers and sought to facilitate cross-Strait investment. However, the student mobilisation of the Sunflower Movement in 2014, which occupied the Legislative Yuan to prevent the ratification of the Cross-Strait Service Trade Agreement, and the subsequent election of the DPP's Tsai Ing-wen as president in 2016 brought this phase of rapprochement to an end.

Since then, the PRC has maintained a dual strategy: on the one hand, it has adopted various packages of measures to promote economic and cultural exchanges—such as the 26 measures of 2019 (Aspinwall, 2019) or the 11 incentives of 2020—which aim to co-opt the support of key sectors within Taiwanese society, particularly politicians, businesspeople and young people. These initiatives include preferential policies granting similar residency conditions to Taiwanese citizens residing on the mainland, or ensuring the same conditions for Taiwanese companies as for their mainland counterparts to participate in strategic projects such as 'Made in China 2025' or the Belt and Road Initiative (West and Insisa, 2024). On the other hand, Beijing has not hesitated to use trade as a punitive tool, particularly by imposing selective phytosanitary measures against agricultural and food products from regions more favourable to the DPP, such as the ban on pineapple imports in 2021 under the pretext of 'food safety', although these have since expanded to cover more than 169 different products by 2024 (Attrill, 2025).

Whilst all these measures share the aim of eroding Taiwanese resolve to resist Beijing's manoeuvres and deepening existing social divisions, their effectiveness is closely linked to the information war and disinformation campaign ravaging the island. Although pro-China propaganda has been a constant feature since the 1950s, the nature of the information landscape has changed since 2018, when a disinformation campaign originating on the mainland propelled KMT candidate Han Kuo-yu to become the mayor of Kaohsiung (Huang, 2019)·

According to data from Taiwan's National Security Bureau (2025), disinformation patterns in 2024 centred on three main themes: scepticism regarding the strength of US support, mistrust of the military, and opposition to the government of Lai Ching-te. These campaigns were launched in parallel with the Taiwanese elections in January 2024, during the two Chinese military drills in May and October 2024, and the US election campaign. For example, in the months leading[1] up to the Taiwanese elections, disinformation increased by 40% and continued after the elections with fake news about alleged electoral fraud (Taiwan FactCheck Center, 2024). Yu, a researcher at the Taiwan Information Environment Research Center, noted that over the past five years, Chinese actors had been spreading narratives to undermine the image of the United States on the island in areas as diverse as support for Ukraine, investments by the semiconductor company TSMC in Arizona, and visits by world leaders to the island. In this regard, rather than creating new narratives, the actors involved merely amplified local Taiwanese voices as there is already a level of local mistrust towards Washington's commitment prior to these disinformation campaigns. In 2025, the rise of generative artificial intelligence and the proliferation of actors—from *micro-influencers* to talk show guests—have amplified false information, particularly regarding legislative proposals on the reinstatement of military courts or national budget cuts (Li, 2025).

[1] Cited in 'In a savvy disinformation offensive, China takes aim at Taiwan elections', Merics Report. Available at:HYPERLINK "https://merics.org/sites/default/files/2023-12/MERICS%20Report%20Disinformation%20Taiwan%20December... https://merics.org/sites/default/files/2023-12/MERICS%20Report%20Disinformation%20Taiwan%20December

To what extent has Beijing achieved its objectives through these hybrid tactics? The main successes lie in Taiwan's growing isolation (only thirteen countries recognise the island diplomatically) and the alteration of the *status quo* in the Strait through constant military escalation without a sufficiently deterrent international response or support for Taipei. However, it has failed to win over the hearts and minds of the Taiwanese: according to data from National Chengchi University, only 7.2% of the population wants reunification with China, whilst a large majority (81.7%) prefers maintaining the *status quo* as of December 2025 (National Chengchi University, 2025). In the realm of disinformation, the most visible campaigns in favour of nationalist candidates in the 2020 and 2024 elections failed to secure the presidency for the KMT. Hung and Hung (2022) demonstrate that pro-China messages serve only to solidify the support of those already sympathetic to Beijing, although they have fuelled internal division and polarisation, thereby fulfilling one of the strategic objectives of these operations.

2.1 How does Taiwan respond to China's hybrid threats?

This relative failure of Chinese operations can be attributed largely to the package of measures implemented by various Taiwanese stakeholders. In the military sphere, President Lai Ching-te has announced an increase in the defence budget to 3.3% of GDP by 2026 and 5% by 2030, as well as an additional extraordinary budget of forty billion dollars earmarked for the acquisition of equipment to facilitate an asymmetric strategy against China, including the development of an anti-aircraft system similar to the Israeli T-Dome (Lee, 2026). Furthermore, they have also reformulated the annual Han Kuang exercises to place greater emphasis on hybrid threats (Dotson and Harman, 2025). However, despite the commitments made to adopt a 'porcupine' strategy, sections of the Taiwanese political and military elite remain fixated on traditional planning that prioritises heavy and conventional weaponry rather than investing more in mobile air and naval defences, or drones and unmanned vehicles (Grieco and Slingbaum, 2025). Furthermore, the opposition KMT and the Taiwan People's Party have sought to block and reduce the defence budget proposed for 2026 within the Legislative Yuan—Taiwan's parliament—, thereby curbing President Lai's ambitions (Valentine, 2026).

But beyond defence, Taipei has become an international leader in the fight against disinformation and foreign interference.

Firstly, the Lai administration has promoted measures for greater inter-ministerial coordination, as well as creating new agencies, such as the Centre for Research on Cognitive Warfare Tactics, attached to the Ministry of Justice (Sang *et al.*, 2024). Furthermore, although it has not yet materialised, Taipei proposed the creation of an international centre for the analysis and countering of Chinese disinformation in collaboration with other democratic partners around the world (Chan, 2024). Secondly, the Taiwanese authorities have adopted three laws—the Public Media Act (2018), the Social Order Maintenance Act (2019) and the Anti-Infiltration Act (2020)—aimed at combating disinformation and interference in the media, political actors and pressure groups, by imposing transparency measures and limiting financial donations to certain sectors. Thirdly, it has banned certain Chinese platforms, such as iQIYI (Baidu's equivalent of YouTube) and Tencent Video, on the island, though not without criticism regarding the implications for freedom of expression. Finally, it has also established a specific curriculum for media literacy in primary and secondary schools to familiarise the population with how to detect false information.

Taiwanese civil society is also becoming increasingly active. On the one hand, Taiwan has developed one of the most active ecosystems for factchecking, with organisations such as the Taiwan FactCheck Center, CoFacts and Doublethink Lab. These self-funded groups have developed multiple strategies to address the challenge of disinformation, maintaining a presence on social media whilst working closely with the National Security Bureau, offering support in verifying disinformation campaigns once they have been identified (Zhang, 2020; Harper, 2025).

Furthermore, in the wake of the Russian invasion of Ukraine, there has been a surge in civil society organisations dedicated to educating the Taiwanese public on how to prepare for and respond to the event of a war. These organisations focus on providing basic knowledge, covering military aspects, the use of weapons, the preparation of survival or first-aid kits, as well as psychological support through courses, talks and training sessions led by activists, retired military personnel and experts working in the fields of security and intelligence (Liu, 2023). In this regard, on January 1st, 2022, the Tsai administration established the Total Defence Mobilisation Agency under the Ministry of National Defence, dedicated to enhancing the capabilities of reservists and improving the population's preparedness for war beyond military structures, creating greater synergies with these civil defence groups and prioritising a whole-of-society approach (Liu, 2023: 110).

Conclusions and implications for the European Union

This article examines the intensification of China's hybrid strategy, both in terms of its theoretical and academic development and its increasing deployment in the Taiwan Strait. Through the repetition and escalation of military manoeuvres and the pervasive nature of disinformation campaigns aimed at demoralising the population, Beijing seeks to secure small victories, transforming the *status quo* whilst preparing for a possible blockade of the island. However, whilst China continues to operate within a context of unlikely war and impossible peace, this confrontation drags on without a clear victory, fuelling lessons for both sides: whilst Beijing learns from Russia and deploys similar tactics in other geopolitical scenarios, Taipei is also innovating in democratic resilience and response measures that limit Beijing's advances and interests—even if they cannot eliminate them entirely.

This case has significant implications for Europe. Democracies around the world face a rise in hybrid threats that strike at the heart of the democratic and security project. In the words of Kaja Kallas, the European Union's High Representative for Foreign Affairs and Security Policy, these attacks represent an 'extreme danger' (Vinocur, 2025) from which we must protect ourselves and not accept as a 'new normal' (Reuters, 2025).

Beyond European interests in Taiwan, ranging from semiconductors to freedom of navigation in the strait, the rise of hybrid threats on the island constitutes both a warning and a learning opportunity. On the one hand, Europe is no stranger to this reality or to the challenges posed by China's hybrid threats to the security and democratic standards of our continent, as demonstrated by explicit references to the use of influence operations and disinformation by Chinese actors by the European External Action Service (EEAS, 2025) or the European Union Agency for Cybersecurity (ENISA, 2025). Brussels must prepare for future challenges, but it must also offer firm resistance to Chinese coercion, both within its borders and around the world, to enhance collective deterrence.

On the other hand, Taiwan can offer lessons (as well as learn from Europe) on how to cooperate and tackle these threats. Spurred on by Russia's annexation of Crimea in 2014, the European Union has been preparing to respond to these challenges by establishing mechanisms for research and raising awareness of these threats, creating specialised units within the EEAS, and enhancing cooperation and coordination with NATO (Brunet, 2025). The Russian invasion of Ukraine in 2022 has only served to underscore the need to delve even deeper into this issue, which has led to milestones such as the creation of the EU Hybrid Toolbox (2022) to ensure greater coordination in joint European responses, or the adoption of sector-specific measures such as the NIS2 Directive to tackle cyberattacks, and the Digital Services Act, which contains specific measures to halt the spread of disinformation on social media. Nevertheless, the successful coordination of the whole-of-society approach*,* the creation of an international coordination centre to tackle disinformation, and the development of the population's capabilities through digital literacy offer examples of good practice to be explored in the European context.

In conclusion, the hybrid laboratory that Taiwan represents today not only anticipates the forms of coercion of the 21st century but also illuminates possible ways to counter them. Looking towards Taipei means recognising that democratic defence depends not only on traditional security, but on the strength of our societies, coordination between institutions, and the speed with which we are able to detect, resist and adapt to diffuse yet persistent threats.

Bibliography

Alaphilippe, A. (2024). Paperwall: Chinese information operation targets Belgium and Luxembourg [online]. *EU DisinfoLab.* [Accessed: 2026]. Available at: https://www.disinfo.eu/paperwall-chinese-information-operation-targets-belgium-and-luxembourg

Aspinwall, N. (2019). Taiwan Rebukes Beijing's New 26 Measures for Cross-Strait Exchanges [online]. *The Diplomat*. [Accessed: 2026]. Available at: https://thediplomat.com/2019/11/taiwan-rebukes-beijings-new-26-measures-for-cross-strait-exchanges/

Attrill, N. (2025). To counter China's coercion of Taiwan, we must track it better [online]. *The Strategist*. ASPI. [Accessed: 2026]. Available at: https://www.aspistrategist.org.au/to-counter-chinas-coercion-of-taiwan-we-must-track-it-better/

Aukia, J. (2023). *China's hybrid influence in Taiwan: Non-state actors and policy responses. Hybrid CoE Research Project 9* [online]. The European Centre of Excellence for Countering Hybrid Threats. [Accessed: 2026]. Available at: https://www.hybridcoe.fi/wp-content/uploads/2023/04/20230406-Hybrid-CoE-Research-Report-9-Chinas-hybrid-influence-in-Taiwan-WEB.pdf

Baker, B. D. (2015). Hybrid Warfare With Chinese Characteristics [online]. *The Diplomat*. [Accessed: 2026]. Available at: https://thediplomat.com/2015/09/hybrid-warfare-with-chinese-characteristics/

Beauchamp-Mustafaga, N. (2024). *Exploring the Implications of Generative AI for Chinese Military Cyber-Enabled Influence Operations: Chinese Military Strategies, Capabilities, and Intent* [online]. Santa Monica, California, Rand Corporation. [Accessed: 2026]. Available at: https://www.rand.org/pubs/testimonies/CTA3191-1.html

Berzina-Cerenkova, U. A. *et al*. (2025). *Capturing FIMI in Strategic and Military Doctrines of Russia and China*. *De-CONSPIRATOR* [online]. European Union. [Accessed: 2026]. Available at: https://deconspirator.eu/wp-content/uploads/2025/10/WM_D2_3.pdf

Bleyer-Simon, K. (ed.) (2025). *Literature review on actors of disinformation in the European Union* [online]. European Digital Media Observatory Policy Report - European University Institute [Accessed: 2026]. Available at: https://edmo.eu/publications/literature-review-on-actors-of-disinformation-in-the-european-union/

Brunet, B. (2025). *Strengthening Europe's Actions Against Hybrid Threats: Setting Up a PROTEUS Programme* [online]. IE University, Global Policy Center. [Accessed: 2026]. Available at: https://www.ie.edu/gpc/publications/strengthening-europes-actions-against-hybrid-threats-setting-up-proteus-programme/

Chan, E. (2024). Taiwan aims to build global platform to counter disinformation [online]. *Radio Free Asia.* [Accessed: 2026]. Available at: https://www.rfa.org/english/news/china/taiwan-disinformation-03202024042824.html

Cui, L. (2021). Mainland China is in no position to take Taiwan by force [online]. *East Asia Forum*. [Accessed: 2026]. Available at: https://eastasiaforum.org/2021/02/26/mainland-china-is-in-no-position-to-take-taiwan-by-force/

Dixon, W. and Beznosiuk, M. (2025). A New Axis of Disinformation: What Europe Must Do Now [online]. ISPI. [Accessed: 2026]. Available at: https://www.ispionline.it/en/publication/a-new-axis-of-disinformation-what-europe-must-do-now-225219

Dotson, J. and Harman, J. (2025). Taiwan's Military Shows New Areas of Focus in a More Ambitious 2025 Han Kuang Exercise [online]. *Global Taiwan Brief*. Global Taiwan Institute. 10(16). [Accessed: 2026]. Available at: https://globaltaiwan.org/2025/08/2025-han-kuang-exercise/

Duke University (2020). *Taiwan National Security Survey* [online]. Taiwan National Security Studies, Duke University. [Accessed: 2026]. Available at: https://sites.duke.edu/tnss/

Dw. (2022). Chinese drone captures close-up footage of Kinmen sentry post; Taiwan confirms soldiers threw stones to drive it away [online]. *Deutsche Welle*. [Accessed: 2026]. Available at: https://www.dw.com/zh-hant/%E4%B8%AD%E5%9C%8B%E7%84%A1 %E4%BA%BA%E6%A9%9F%E8%BF%91%E6%8B%8D%E9%87%91%E9%96%80%E5%B4%97%E5%93%A8-%E5%8F%B0%E8%AD%89%E5%AF%A6%E5%A3%AB%E5%85%B5%E4%B8%9F%E7%9F%B3%E9%A9%85%E9%9B%A2/a-62919661

Enisa. (2025). *ENISA Threat Landscape 2025* [online]. European Union Agency for Cybersecurity. [Accessed: 2026]. Available at: https://www.enisa.europa.eu/sites/default/files/2026-01/ENISA%20Threat%20Landscape%202025_v1.2.pdf

Fan, Y. A. (2025). PRC Gray Zone Activities Against Taiwan: Civilian Drone Incursions [online]. *Jamestown - China Brief*. 24(24). [Accessed: 2026]. Available at: https://jamestown.org/prc-gray-zone-activities-against-taiwan-civilian-drone-incursions/

Galeotti, M. (2018). (Mis)Understanding Russia's Two "Hybrid Wars" [online]. *Eurozine*. [Accessed: 2026]. Available at: www.eurozine.com/misunderstanding-russias-two-hybrid-wars/

Grieco, K. A. and Slingbaum, H. (2025). Taiwan's Squandered Defensive Potential [online]. Stimson Center. [Accessed: 2026]. Available at: https://www.stimson.org/2025/taiwans-squandered-defensive-potential/

Grossman, D. (2025). *The Chinese Communist Party's Gray Zone Tactics Against Taiwan* [online]. Washington, DC, Global Taiwan Institute. [Accessed: 2026]. Available at: https://

globaltaiwan.org/wp-content/uploads/2025/03/OR_CCP-Gray-Zone-Tactics-Against-TW.pdf

Harold, S. W., Beauchamp-Mustafaga, N. and Hornung, J. W. (2021). *Chinese Disinformation Efforts On Social Media* [online]. Santa Monica, California, Rand Corporation. [Accessed: 2026]. Available at: https://www.rand.org/content/dam/rand/pubs/research_reports/RR4300/RR4373z3/RAND_RR4373z3.pdf

Harper, C. (2025). How Taiwan Is Trying to Defend Its Democracy From Mis- and Disinformation [online]. *The Diplomat*. [Accessed: 2026]. Available at: https://thediplomat.com/2025/09/how-taiwan-is-trying-to-defend-its-democracy-from-mis-and-disinformation/

Hawkins, A. (2025). US announces more than $10bn of arms sales to Taiwan. *The Guardian*. [Accessed: 2026]. Available at: https://www.theguardian.com/world/2025/dec/18/us-announces-more-than-10bn-of-arms-sales-to-taiwan

Huang, P. (2019). Chinese Cyber-Operatives Boosted Taiwan's Insurgent Candidate [online]. *Foreign Policy*. [Accessed: 2026]. Available at: https://foreignpolicy.com/2019/06/26/chinese-cyber-operatives-boosted-taiwans-insurgent-candidate/

Hung, T.-C. and Hung, T.-W. (2022). How China's Cognitive Warfare Works: A Frontline Perspective of Taiwan's Anti-Disinformation Wars. *Journal of Global Security Studies*. 7(4), pp. 1–18. DOI: https://doi.org/10.1093/jogss/ogac016

Insisa, A. (2023). Hybrid after All: The "Grey Zone", the "Hybrid Warfare" Debate, and the PLA's Science of Military Strategy. *Defence Strategic Communications*. Vol. 12, pp. 165–186. DOI: 10.30966/2018.RIGA.12.8

Koh, E. (2025). China holds military drills around Taiwan as warning to "separatist forces" [online]. *BBC*. [Accessed: 2026]. Available at: https://www.bbc.com/news/articles/c87l7xjp235o

Lee, Y. (2026). Chinese cyberattacks on Taiwan infrastructure averaged 2.6 million a day in 2025, report says [online]. *Reuters*. [Accessed: 2026]. Available at: https://www.reuters.com/world/china/chinese-cyberattacks-taiwan-infrastructure-averaged-26-million-day-2025-report-2026-01-05/

Lee, Y. and Blanchard, B. (2025). Taiwan plans extra $40 billion in defence spending to counter China [online]. *Reuters*.

[Accessed: 2026]. Available at: https://www.reuters.com/world/china/taiwan-president-says-he-will-propose-extra-40-billion-defence-spending-2025-11-25/

Li, W.-P. (2025). Analysis of Chinese-language False Information Trends: January–June 2025 [online]. Taiwan FactCheck Center. [Accessed: 2026]. Available at: https://en.tfc-taiwan.org.tw/chinese-disinformation-trends-analysis-jan-jun-2025/

Lin, B. *et al.* (2022). *Competition in the Gray Zone* [online]. Santa Monica, California, RAND. [Accessed: 2026]. Available at: https://www.rand.org/pubs/research_reports/RRA594-1.html

Liu, W. (2023). The mundane politics of war in Taiwan: Psychological preparedness, civil defence, and permanent war. *Security Dialogue*. Sage Journals. 55(1). DOI: https://doi.org/10.1177/09670106231194908

Mazarr, M. J., Heath, T. R. and Cevallos, A. (2018). *China and the International Order*. Santa Monica, CA, RAND Corporation.

Military News Agency. (2025). CCP's Targeted Military Exercises: Ministry of National Defence Calls for Calm Response to Ensure National Security – Ministry of National Defence Military News Agency [online]. Military News Agency of the Republic of China. [Accessed: 2026]. Available at: https://mna.mnd.gov.tw/news/detail/?UserKey=cb32e627-ce3d-4823-aa16-d490cd4e7b39

Monaghan, S. (2019). Countering Hybrid Warfare: So What for the Joint Force? *PRISM*. 8(2), pp. 82–98.

Mumford, A. and Carlucci, P. (2022). Hybrid warfare: The continuation of ambiguity by other means. *European Journal of International Security*. Cambridge University Press. 8(2), pp. 192–206. DOI: https://doi.org/10.1017/eis.2022.19

National Security Bureau. (2025). China's disinformation dissemination patterns in 2024 [online]. National Security Bureau. [Accessed: 2026]. Available at: https://www.nsb.gov.tw/en/assets/documents/%E6%96%B0%E8%81%9E%E7%A8%BF/1eeba30c-ebf8-459a-8fe3-ed2a54cb4ca0.pdf

—. (2026). Analysis of China's Cognitive Warfare Tactics Against Taiwan in 2025 [online]. Ministry of National Defence of the Republic of China. [Accessed: 2026]. Available at: https://www.globalsecurity.org/intell/library/reports/2026/2025-china-cognitive-warfare-tactics-against-taiwan_nsb_20260110.pdf

Ong, W. (2018). The rise of hybrid actors in the Asia-Pacific. *The Pacific Review*. 31(6), pp. 740–761. DOI: https://doi.org/10.1080/09512748.2018.1513549

Pla Daily. (2004). 中国人民解放军开始"三战"的研究和训练 [online]. *Sina.cn*. [Accessed: 2026]. Available at: http://mil.news.sina.com.cn/2004-07-16/1738210714.html

Qiao, L. and Wang, X. (1999). *Unrestricted warfare*. Brattleboro, VT: Echo Point Books & Media, LLC.

Qiu, S. (2025). Ships can enter and leave Taiwan's major ports during PLA exercises; no blockade by Chinese coast-guard [online]. Taiwan FactCheck Center. [Accessed: 2026]. Available at: https://tfc-taiwan.org.tw/fact-check-reports/taiwan-ports-not-blocked-by-chinese-coast-guard/

Reuters. (2025). Hybrid threats cannot be accepted as the new normal, says EU's Kallas [online]. *Reuters*. [Accessed: 2026]. Available at: https://www.reuters.com/world/hybrid-threats-cannot-be-accepted-new-normal-eus-kallas-says-2025-11-14/

Saalman, L. (2021). China and its hybrid warfare spectrum. In: Weissman, M. *et al*. (eds.). *Hybrid Warfare: Security and Asymmetric Conflict in International Relations*. London, I. B. Tauris, pp. 95–112.

Sang, H.T., Thien, T.T. and Nhi, L.T.Y. (2024). How Taiwan fights the disinformation war [Online]*. Lowy Institute-The Interpreter* [Accessed: 2026]. Available at: https://www.lowyinstitute.org/the-interpreter/how-taiwan-fights-disinformation-war

European External Action Service (EEAS). (2025).*3rd EEAS Report on Foreign Information Manipulation and Interference Threats* [online]. Brussels, European External Action Service. [Accessed: 2026]. Available at: https://www.eeas.europa.eu/sites/default/files/documents/2025/EEAS-3nd-ThreatReport-March-2025-05-Digital-HD.pdf

Sun Tzu. (2019 [5th century BC]). *The Art of War*. Barcelona, Publicacions Abadia de Montserrat.

Taiwan Plus. (2025). Why Does China Intrude Into Taiwan's Air Defence Identification Zone? [online]. *TaiwanPlus*. [Accessed: 2026]. Available at: https://www.taiwanplus.com/news/taiwan-news/military/251021002/why-does-china-intrude-into-taiwans-air-defense-identification-zone

Taiwan FactCheck Center. (2024). Viral vídeo: "This isn't vote rigging! What is vote rigging?" [online]. Taiwan FactCheck

Center. [Accessed: 2026]. Available at: https://tfc-taiwan.org.tw/fact-check-reports/migration-10259/

National Chengchi University. (2025). Changes in the Unification – Independence Stances of Taiwanese as Tracked in Surveys by Election Study Center (1994–2025.12) [online]. Election Study Center, National Chengchi University. [Accessed: 2026]. Available at: https://esc.nccu.edu.tw/upload/44/doc/6963/Tondu202512.png

Valentine, Ashish. (2026) The Taiwanese president's proposal to hike defence spending faces gridlock at home [online]. *NPR* [Accessed: 2026]. Available at: https://www.npr.org/2026/01/22/nx-s1-5683130/taiwan-defense-spending

Vinocur, N. (2025). Hybrid attacks are "extreme danger" for EU, says top diplomat as Putin threat grows [online]. *Politico*. [Accessed: 2026]. Available at: https://www.politico.eu/article/hybrid-attacks-extreme-danger-top-eu-diplomat-kallas-threat-putin-russia-grows/

Wallis, J. (2019). China and Russia aren't the same when it comes to information warfare [online]. *The Strategist*. ASPI. [Accessed: 2026]. Available at: https://www.aspistrategist.org.au/china-and-russia-arent-the-same-when-it-comes-to-information-warfare/

Wang, H. and Zakheim, B. (2025). *China's Lessons from the Russia-Ukraine War*. Santa Monica, California, *RAND.*

West, M. J. and Insisa, A. (2024). Reunifying Taiwan with China through Cross-Strait Lawfare. *The China Quarterly*. Cambridge University Press. Vol. 257, pp. 186–201. DOI: https://doi.org/10.1017/s0305741023000735

Xiao, T. (ed.). (2015). *Science of Military Strategy*. Beijing, National Defense University Press.

Zhang, L. (2020). How to Counter China's Disinformation Campaign in Taiwan [online]. *Military Review*. [Accessed: 2026]. Available at: https://www.armyupress.army.mil/Journals/Military-Review/English-Edition-Archives/September-October-2020/Zhang-Disinformation-Campaign/

Chapter Five

Two challenges to European energy security: the Russian gas crisis and dependence on China for energy transition technologies

José María Calvo-Sotelo

Abstract

This chapter analyses two very different challenges to the European Union's energy security: 1) the Russian gas crisis following the Russian invasion of Ukraine in February 2022, at a time when Germany imported all the gas it consumed and 72% of that gas came from Russia, and 2) China's dominance over the supply chains of the most important energy transition technologies, a dominance that China demonstrated on several occasions throughout 2025 by imposing controls on exports of rare earths (and the intermediate and final products incorporating them, such as permanent magnets) and lithium-ion batteries. These controls put European (and North American) industry in a tight spot and forced the Trump administration to sign a 'truce' with the Chinese government last October in their trade war.

Both challenges are examples of how Europe, over the last two decades, has jeopardised the security of supply of its energy system by opting for the cheapest alternatives. This was the case with Germany and the rest of Central Europe's reliance on Russian gas, and it is happening across Europe with the industries key to its energy transition—a transition that today depends on supply chains largely controlled by Chinese companies.

Keywords

European Union, Security of supply, Energy sovereignty, Critical minerals, Trade war.

Introduction

Just as Michael Porter's 'five forces' served for several decades to structure the analysis of competitiveness across any industry, the famous energy trilemma has dominated analyses and foresight regarding energy supply and consumption systems for at least two decades, particularly in advanced economies. This trilemma highlights the difficult balance that every energy system must strike between three fundamental variables: security of supply, affordability and environmental sustainability. The first two variables, security and cost, came to the fore with the first oil crisis in the 1970s, which highlighted the power that Middle Eastern oil-producing countries had concentrated over the supply of fossil fuels to the major Western economies. It would take almost forty more years for the variable of environmental sustainability to gain prominence, and it did so in the shadow of the shale oil and gas revolution in North America, which definitively resolved the security of supply challenge brought about by the first oil crisis.

The signing of the Paris Agreement on climate change at COP 20 in 2015 gave the decisive boost to the environmental sustainability variable, by enshrining as a universal mandate that the increase in the average surface temperature of the Earth should not exceed 2 °C by the end of this century, and preferably should not exceed 1.5 °C, both increases measured against the average temperature of the pre-industrial era. The 2018 special report by the IPCC (United Nations Intergovernmental Panel on Climate Change) reinforced the 1.5 °C target and set 2050 as the year by which the world should complete its energy transition towards a decarbonised and climate-neutral economy, a target better known as Net Zero by 2050. In 2021, the European Union enshrined this climate neutrality target in law through Regulation 2021/1119, in which it defined climate change as an 'existential threat'. A few months later, COP 26 in Glasgow endorsed the Net Zero by 2050 target, and the International Energy Agency, an OECD body, published its seminal report *Net Zero by 2050: A Roadmap for the Global Energy Sector*. This report, the largest energy foresight exercise undertaken to date, served as a guide detailing the energy transition of the various sectors of the global economy (electricity generation, transport, industry and buildings) towards climate neutrality, identifying at every stage the new technologies that would make it possible. At almost the same time, the IPCC published its Sixth Assessment Report (better known as the

AR6 report), a compendium of scientific knowledge on climate change to date, which incorporated for the first time the 1.5°C target as a necessary condition for quantifying CO_2 emission 'mitigation' policies for the 21st century.

Armed with this scientific, technical, economic and legal framework, by the end of 2021 the European Union had mapped out the green transition of its energy system for the next three decades, setting binding targets for CO_2 emission reductions for the years 2030 (55%) and 2040 (90%) compared to 1990 levels. Its Green Deal was being rolled out across at least fifteen regulatory fronts, ranging from the two Emissions Trading Schemes (ETS) to the Carbon Border Adjustment Mechanism (CBAM), via the Energy Efficiency Directive and the Directive on renewable fuels of non-biological origin. But then February 2022 arrived and Russia invaded Ukraine—'events, my dear boy, events'—wiping out security of supply and affordable energy costs in the European Union in one fell swoop: Russian gas was no longer a secure source of energy. In 2021, natural gas accounted for almost 25% of the EU's total primary energy consumption, with a very significant concentration in electricity generation, industrial heat production and domestic heating. The EU imported 85% of the gas it consumed. Russian gas, which reached Central Europe via various pipelines, accounted for 41% of the EU's total natural gas imports.

The war in Ukraine and the Russian gas crisis left solar and wind energy, however, unscathed; immune to the geopolitical risks associated with fossil fuels, these renewable energy sources emerged stronger than ever. The energy transition had found in 'energy sovereignty' and 'strategic autonomy' two powerful allies to accelerate the decarbonisation of our economies and the transition away from fossil fuels agreed at COP 28 in Dubai in December 2023. But in that same year, China once again demonstrated (it had not done so since 2010) the control it exercised over the supply chains of key technology sectors for the energy transition, calling into question the sovereignty that the energy transition seemed to bring with it. Indeed, throughout 2023, and in retaliation for the restrictions the Biden administration had imposed in October 2022 on exports to China of advanced chips for artificial intelligence applications, China imposed restrictions and controls on exports of several critical minerals (germanium, gallium, graphite and antimony) and of certain rare earths and permanent magnets to the United States. The tug-of-war between the two countries would continue into 2024 and escalate in 2025, when the Trump administration added a tariff war to the chip controls. By October of last year, China had extended its controls to twelve of the seventeen rare earths and to all intermediate and final products containing them (primarily permanent magnets). This threw the supply chains of a multitude of industrial sectors into disarray: high-tech and defence, on the one hand, and other sectors key to the energy transition, such as the manufacture of electric vehicle motors, batteries and wind turbines. At this point, the Trump administration blinked first and agreed to a one-year truce with Xi Jinping, under which China lifted its controls on rare earths and the United States allowed the export of certain Nvidia chips to Chinese companies, among other concessions. China's show of strength, sustained and escalated over two years, had succeeded.

The EU had been an observer and a victim of this crossfire, and Commission President Ursula von der Leyen accused China of establishing a 'pattern of dominance, dependency and blackmail' to drive its competitors into bankruptcy. China's control over the main supply chains of the energy transition (see figure 1) is the result of the enormous market power of its large companies, a power they have built by applying that 'pattern of dominance' under state direction that von der Leyen denounced. Europe has witnessed this with the European photovoltaic industry, which, two decades after its initial take-off, has virtually disappeared from its territory. But it would be a misdiagnosis to explain this market power solely as the result of years of public subsidies and massive dumping of its products. Chinese companies are dominant because the People's Republic of China itself is the world's largest consumer of its products: solar panels, rare earths and critical minerals, batteries and electric vehicles. This almost captive market and a 'well-to-wheel' vertical integration built up over the years have been the main pillars of its competitive strategy, to return to Michael Porter. On these pillars, they have built economies of scale and levels of efficiency that are difficult for their Western competitors to match.

What do these two challenges (Russian gas and Chinese dominance) that you intend to analyse have in common? From 2000 until the invasion of Ukraine (Energy Institute 2025), Europe imported between 30% and 35% of its annual gas consumption from Russia. During the same period, Germany's annual consumption accounted for between 40% and 50% of Russian imports.

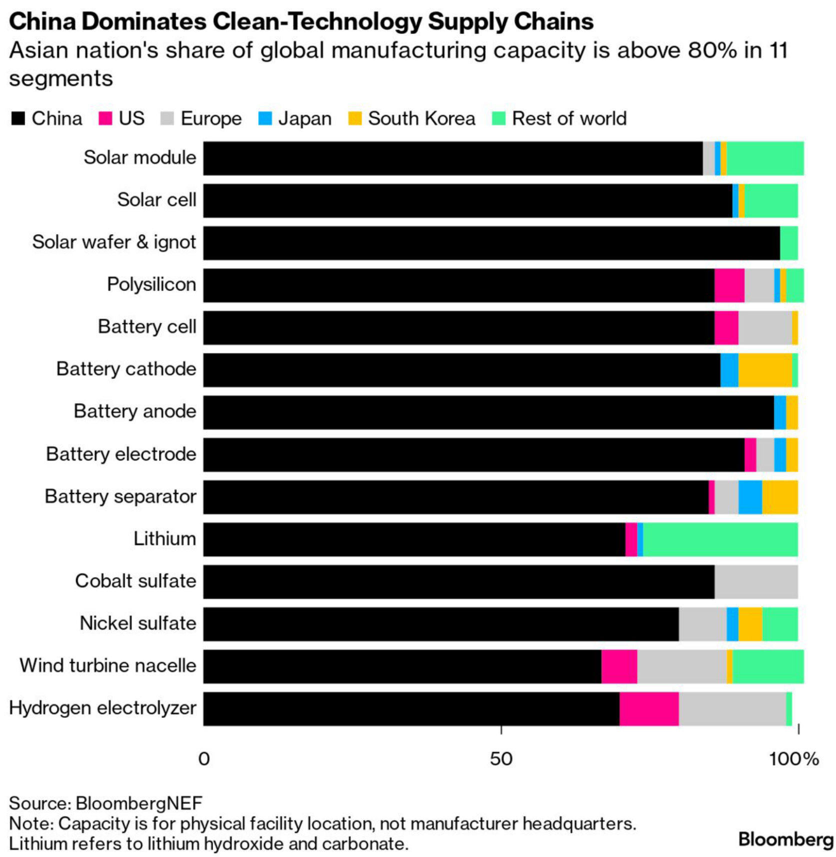

Figure 1. China dominates the supply chains for clean technologies. ***Source*: BloombergNEF**

Russian gas was the cheapest, until the invasion of Ukraine took it off the table. If we look at the energy trilemma of security, cost and sustainability, we can conclude that Germany and much of Central Europe opted for the lowest cost at the expense of security. If we now look at the last fifteen years of the energy transition, is something similar not happening? Is the focus not on the lowest cost (the Chinese option) at the expense of security? Has Europe as a whole not reached levels of risk concentration with Chinese industry that are incompatible with its economic security? Let us look in more detail at how the EU has successfully coped with the disruption caused by the Russian invasion of Ukraine to natural gas supplies, and at the challenges it faces in diversifying risks and improving the security of its energy transition supply chains.

1 The reconfiguration of the European energy system following the Russian invasion of Ukraine: the emergence of liquefied natural gas as a substitute for Russian gas

On 3 December 2025 in Brussels marked a turning point in European energy policy, as part of the European Union's long-term response to Russia's invasion of Ukraine. Following months of negotiations between the European Commission, the European Parliament and the Council, the Commission presented an agreement aimed at phasing out Russian gas imports, with the explicit goal of a total ban by the end of 2027. The agreement set out a phased and legally binding timetable: a ban on new contracts for Russian gas imports (both via pipeline and by ship in the form of liquefied natural gas) from 2026, clear deadlines for the phasing out of existing contracts and, as a final deadline, the complete elimination of all Russian gas imports during 2027. The proposal represented the culmination of a strategy launched following the outbreak of the war, which in three years had succeeded in reducing the share of Russian gas from 47% of imports in 2021 to 13% in 2025. The stated aim of REPowerEU was to close once and for all the 'backdoor' that had allowed Moscow to use gas as a tool for economic and political pressure. Although the regulation still had to be formally ratified by the Parliament and the Council, the announcement on 3 December was welcomed as a decisive step towards a European Union that is more independent in its energy supply. But what is most interesting is understanding how such a substantial shift in the supply of such large quantities of gas could be achieved in such a short space of time, given that the roll-out of new energy supply infrastructure is typically a very long-term project. To do this, it is best to look closely at the German case, because Germany is the EU's largest gas consumer and the country that was most dependent on Russian gas supplies in 2021.

The speed with which Germany made this transition should not be underestimated. In 2021, gas imports from Russia accounted for 72% of all its gas imports from outside the EU (see figure 2), with the remainder coming from Norway. All of Germany's gas imports (its domestic production is negligible) were via pipeline, because in 2021 it had no liquefied natural gas (LNG) regasification facilities, which severely limited its ability to diversify its supply sources. This is how the German government passed its 'LNG Acceleration Act' in May 2022 and was able to commission its first floating regasification unit (FSRU) as early as December of that same year in the port of Wilhelmshaven. The capacity of this facility was around 6.7 bcm per year, roughly 7% of national consumption in 2021—a significant volume, yet illustrative of the scale of the challenge. Throughout 2023, two additional floating terminals were commissioned, bringing LNG reception capacity to 16.7 bcm, and in 2024 a further terminal was commissioned, reaching a total capacity of 24.7 bcm, which by then equalled 30% of national gas consumption. By 2024, pipeline imports into Germany from outside the EU had fallen to 37 bcm from 104 bcm in 2021, all of which came from Norway. Across the EU as a whole, since the invasion of Ukraine, the capacity of LNG regasification terminals had increased by 45%, an additional 75 bcm on top of the 165 bcm recorded in 2021, with Germany, the Netherlands and Italy leading this investment drive.

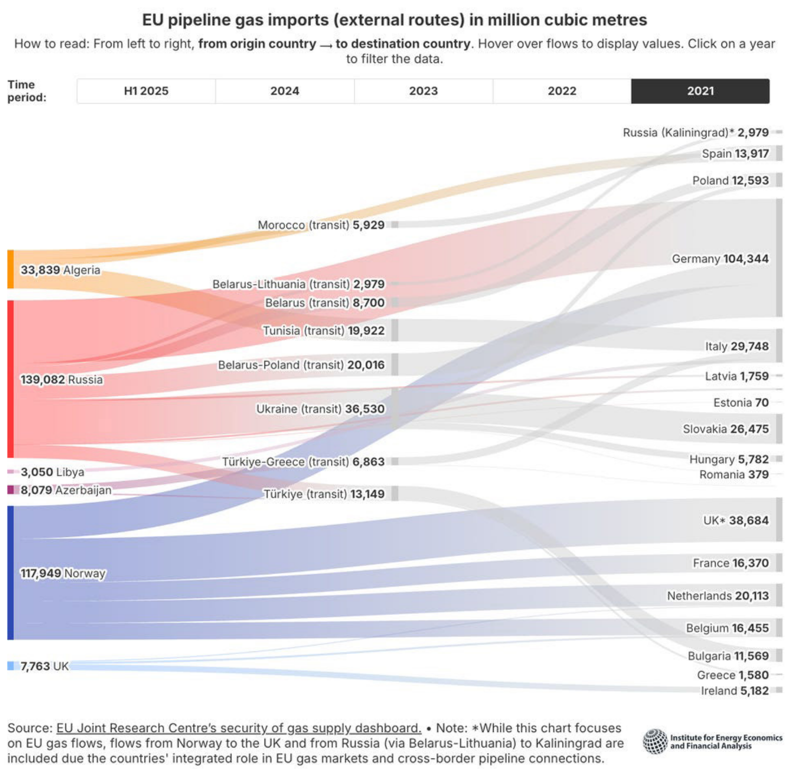

Figure 2. EU pipeline gas imports (external routes) in 2021, in million cubic metres. *Source*: EU JRC and IEEFA

Consequently, LNG imports into the EU rose from 23% of the total in the first half of 2021 to 48% in the first half of 2025, almost matching imports via pipeline, which were led by Norway at 55%. Over the same period, the share of Russian gas imported, whether via pipeline or by ship as LNG, fell from 47% to 13%. Today, 60% of the EU's total gas imports come from the United States (LNG), Norway (pipeline) and the United Kingdom, followed by Algeria (pipeline) and Qatar (LNG), which account for a further 16%.

The only flows of Russian gas imported by the EU that remain after these three years are those from the Turkish pipeline to Bulgaria and LNG by ship, with the main importers being France, Belgium and Spain (see figure 3), which signed 20-year contracts in 2018 with the Russian company Novatek and its subsidiary Yamal LNG. The EU agreement of 3 December aims to phase out all these flows by the end of 2027

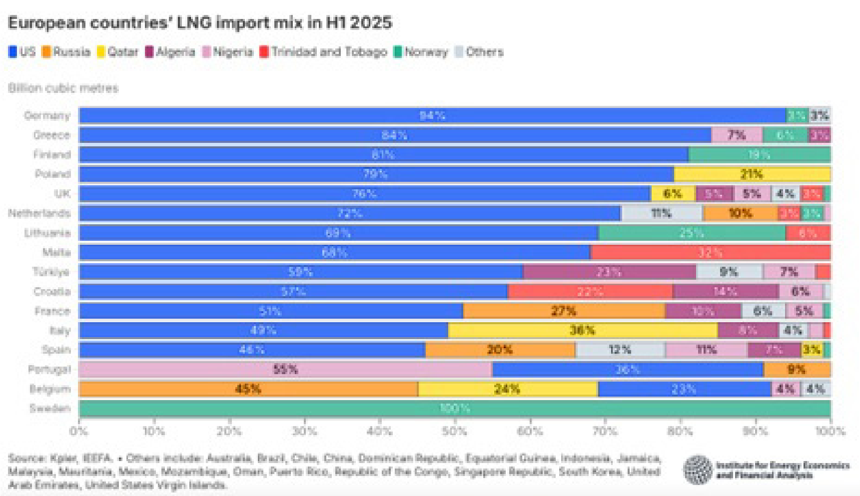

Figure 3. Mix of LNG imports by European countries in the first half of 2025.
***Source*: IEEFA**

Gas accounts for around 24% of the European Union's primary energy supply, second only to oil at 33% (IEA, 2025a). In the first half of 2025, 48% of this gas arrived by ship and 52% via pipelines, mainly from Norway, the United Kingdom and Algeria. The capacity of liquefied natural gas (LNG) regasification plants on European soil is expected to exceed 350 bcm/year, well above the less than 200 bcm/year of LNG demand forecast for the coming years (IEEFA, 2025b). To this current reality of the EU's gas supply must be added the growth prospects for LNG supply over the next ten years, which will underpin the sustained improvement in two of the variables of the energy trilemma: security of supply and affordability. The International Energy Agency (IEA), in its Gas 2025 report published last October, forecasts growth in global LNG liquefaction capacity of 300 bcm by 2030, of which expansion projects in the US and Qatar alone account for 70% (see Figure 4). However, the IEA does not believe that new global demand for LNG will exceed 250 bcm by 2030, which will add downward pressure on prices. This growth will be accompanied by greater flexibility and diversity in LNG contracts, which will bring greater liquidity to the market, bolstering security of supply in the face of new geopolitical risks. Meanwhile, the IEA forecasts that European gas demand will contract by 8% by 2030, due to the declining share of gas in electricity generation resulting from the growth of wind and solar power.

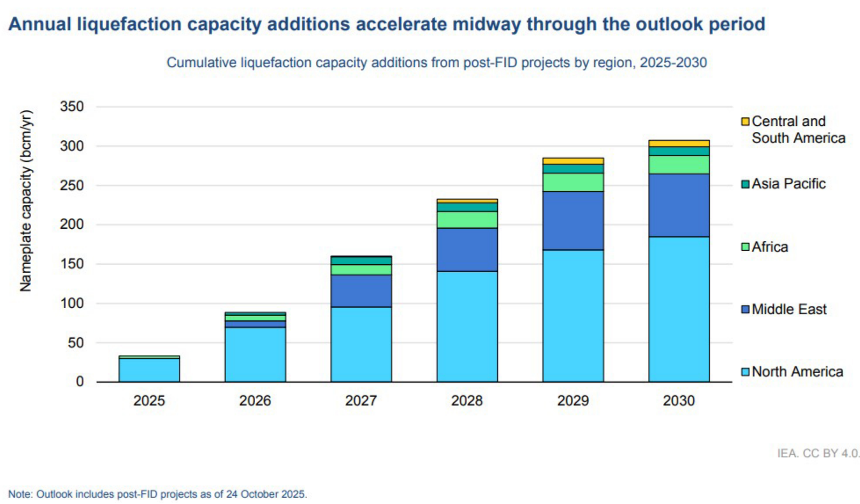

Figure 4. New gas liquefaction capacity by region, 2025–2030.
***Source*: IEA, Gas 2025**

The Trump administration's intervention in Venezuela and its oil industry does not appear likely to affect the prospects for improved security of supply and affordable fossil fuel costs in the near future. OPEC is losing one of its founding members, and the North American bloc would come to control 30% of global oil production, according to analysts at JP Morgan. These analysts predict that it could take Venezuela a decade to recover the three million barrels per day it was producing before 2010, but that within two years it could manage to double the current level of 750,000 barrels. Increased Venezuelan production would add to the forecast (IEA, 2025e) of a five-million-barrel-a-day increase in supply between now and 2030. China is currently the leading importer of Venezuelan oil, and a significant portion of its loans to Venezuela, estimated at USD 60 billion (Michal Meidan, 2025), are secured by oil contracts. Imports of Venezuelan crude account for barely 4% of the PRC's imports, meaning there would be no risk of supply shortages for China if the US were to redirect these volumes to other markets.

All the above serves to propose a series of important conclusions, looking to the medium and long term beyond the serious turbulence that the Trump administration is causing in transatlantic relations:

1. The enormous capacity of the entire global gas supply chain (particularly that of liquefied natural gas and Norway) to resolve, within such a short timeframe, a disruption of the magnitude caused by the Russian invasion of Ukraine.
2. The great geographical diversity of liquefied natural gas supply sources and the low geopolitical risk associated with most of the European Union's gas-supplying countries.
3. The security and diversity of supply sources that it offers will establish LNG as an essential component of the European energy supply system in the long term, with a structural and upward impact on its costs.
4. The expected growth in LNG supply, led by the United States and Qatar, by 2030—which is set to outstrip projected demand—could result in a downward trend in current LNG prices for the remainder of the decade, and in increasing market liquidity that will help mitigate any new geopolitical risks that may arise.

2 The challenges posed by Chinese companies' control of supply chains key to the energy transition

The background to China's political use of its control over the rare earths value chain dates back to September 2010. In retaliation for a diplomatic incident with Japan, China responded with an undeclared embargo on its rare earths exports to the Land of the Rising Sun. At the time, Japan was the world's leading importer and China its almost sole supplier. That *de facto* embargo lasted barely a few weeks, but it was followed by a sudden surge in international rare earth prices in 2011, a rise that saw prices increase more than tenfold compared to previous benchmarks. In 2014, the World Trade Organisation (WTO) condemned China for manipulating international markets in favour of its domestic industry through a system of licences, quotas and export tariffs that drastically reduced the availability of rare earths on international markets, causing the aforementioned price surge in 2011. But Japan's reaction to China's embargo was much swifter. As early as 2011, the Japanese government instructed JOGMEC (Japan Oil, Gas and Metals National Corporation) to increase the strategic reserve of rare earths and critical minerals that had been established in 1983, emulating the strategic oil reserves created in the wake of the 1970s crisis. At the same time, Japan sought to diversify its supply sources and, among other projects, financed the expansion of a large mine in Australia (Lymas), which today remains (along with MP Materials in the US) one of the leading producers of rare earths outside China.

Between 2010 and 2020, rare earth extraction appears to have remained very stable, judging by the production figures for Chinese mines published by the US Geological Survey (USGS): 130,000 tonnes in 2010 and 140,000 in 2020. However, between 2020 and 2024, again according to the USGS, China's production share is estimated to have almost doubled to 270,000 tonnes, accounting for 70% of global production potential. In its 2023 study on critical raw materials, the European Union attributed a 68.3% share of rare earth extraction to China. But when it comes to their further processing and incorporation into intermediate or final products such as permanent magnets, China's global share consistently exceeds 85% (two decades ago, Japan controlled 50% of this market). It is in this dominance of the value chain downstream of rare earth extraction that China's true position of control in the global market lies. According to the Rare Earths Industry Association (REIA), 75% of the economic value of rare earths end-use applications is concentrated in the production of permanent magnets. According to the International Energy Agency (IEA), 'China exported 58,000 tonnes of permanent magnets in 2024, enough to manufacture components for millions of cars, industrial motors or aircraft, or to build thousands of strategic military systems, data centres or wind turbines'. The explosion in growth over the last five years has been the result of rising demand for permanent magnets for electric vehicle motors, direct-drive wind turbines and for defence sectors such as medium-altitude long-endurance UAVs, the unmanned aerial vehicles more commonly known as drones.

Consequently, the economic impact of the controls introduced by China in 2025 increased by several orders of magnitude when they came to cover not only raw materials, but also the intermediate and final products containing them ('parts, components and assemblies'). The initial controls, introduced in April of that year, affected seven of the seventeen rare earth elements and their intermediate and final products, including permanent magnets, and were only mandatory for Chinese exporting companies. The granting of export licences required them to identify end-users, specify particular uses and accept a level of scrutiny that many international companies would consider incompatible with commercial confidentiality. By October (MOFCOM Decision No. 61), the controls had been extended to twelve rare earths and their derivative products, also requiring ''foreign organisations'' to obtain a dual-use export licence for products containing rare earths of Chinese origin or manufactured using Chinese technologies. Controls were also introduced on the export of key machinery and equipment for the refining and processing of rare earths, technologies over which China maintains a virtual global monopoly. The extraterritorial nature of these measures was in the finest tradition of the US sanctions regime and, as with all measures of this kind, their success depended on the market

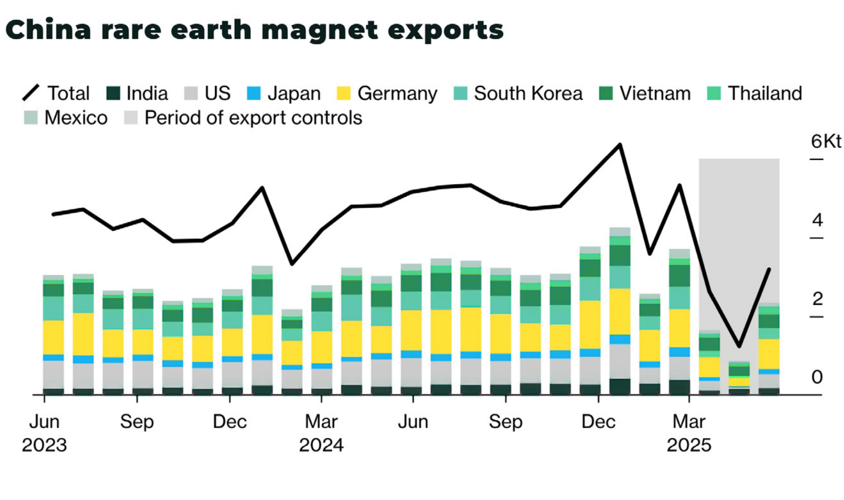

Figure 5. Chinese exports of rare-earth magnets. *Source*: PRC Customs Administration

power of the sanctioning state. Just as US sanctions are particularly effective when it comes to financial transactions in dollars, so too would China's be in the field of rare earths. See Figure 5 for the decline in Chinese exports of permanent magnets from March 2025 onwards, which resulted in prices on the European market being up to six times those in China.

However, the introduction of administrative controls in October 2025 was not limited to rare earths and their applications. On the same date, the Ministry of Commerce of the People's Republic of China published (MOFCOM Decision No. 58) new controls on lithium-ion batteries, as well as on their components and the technology and machinery used in their manufacture. This was the first time MOFCOM had imposed export controls on the battery industry. As with rare earths, the licences required the identification of end-users and details of specific uses. As with rare earths, China maintains control over more than 80% of battery supply chains, and in some links this figure is close to 100% (see figure 6). LFP (lithium iron phosphate) batteries account for half of the global electric vehicle market and virtually all energy storage batteries, both sectors being crucial to the progress of decarbonisation in transport and electricity generation.

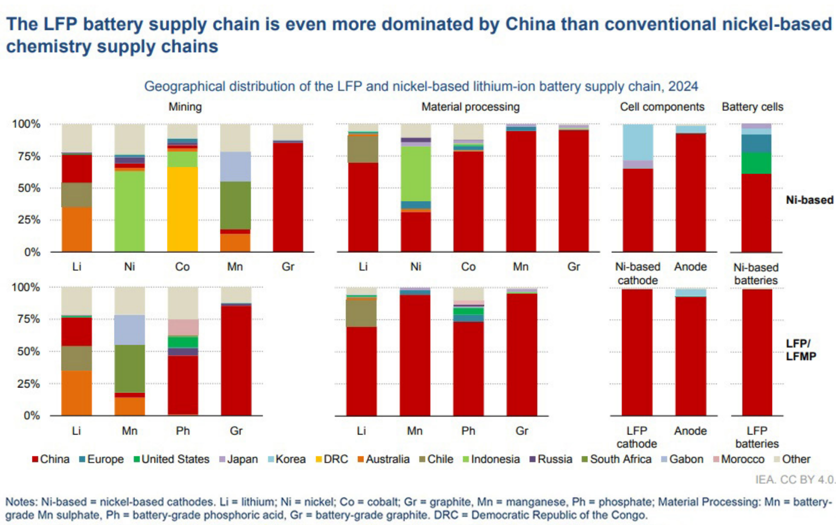

Figure 6. Geographical distribution of the lithium and nickel battery supply chain, 2024. *Source*: IEA

If one considers the size of the markets in question, the battery market is much larger than that for permanent magnets.

According to the IEA's conservative STEPS scenario for 2030 (IEA, 2024), investment in batteries could be around USD 500 billion, whilst that in permanent magnets would be between USD 35 billion and USD 50 billion, according to various sources. However, both industries share the systematic application of a sustained national strategy over time: the vertical integration of their activities across all links in their products' value chain, with the aim of achieving decisive influence in the markets in which they operate. This vertical integration allows them to transfer value from one link to another using internal transfer prices, with the aim of eliminating competition from companies operating in only one or several of these links. Generally, these industries are led by large companies whose shareholding is partly public or which, in any case, are subject to significant state control. The ultimate reason for the success of this strategy is that these companies enjoy a virtual monopoly over their domestic market, which generally accounts for at least 50% of global demand. The primary reason for China's export controls decades ago was to ensure that foreign competition (at that time for raw materials) did not hinder the take-off of China's nascent industries. No foreign company today has a captive market of that size, and therefore none achieves the levels of vertical integration seen in China (see figure 7 from the SAFE Center for Critical Minerals Strategy, 2025).

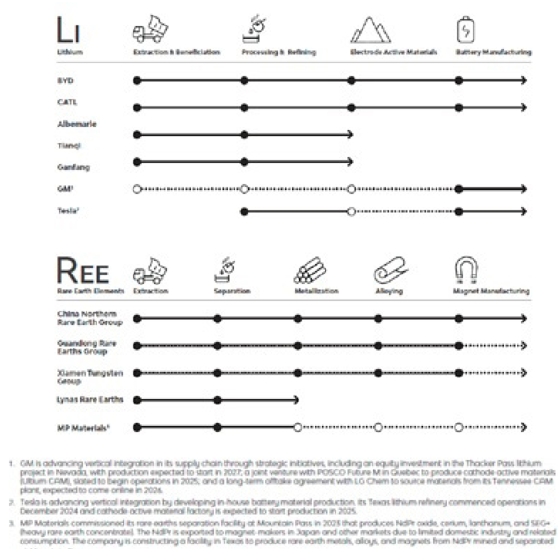

Figure 7. Vertical integration of Chinese and Western companies in the manufacture of batteries (Li) and rare earth permanent magnets (REE). ***Source*: SAFE**

This market dominance by Chinese companies is replicated in other industrial sectors highly relevant to the energy transition (see figure 1 once again), and notably in solar photovoltaics. In this sector, once again, the strategy of vertical integration and the support of the captive domestic market is replicated as indispensable tools for achieving control over supply chains. In 2024, the Chinese market accounted for 62% of new photovoltaic installations worldwide —340 GW out of a total of 550 GW (IEA, 2025f)—. At the same time, the IEA estimates (IEA, 2025f) that China dominates the four main links in the solar panel production chain (polysilicon, wafers, cells and modules) with shares of between 75% and 95% of global manufacturing capacity, and that this dominance will remain unchanged for the rest of the decade (see figure 8).

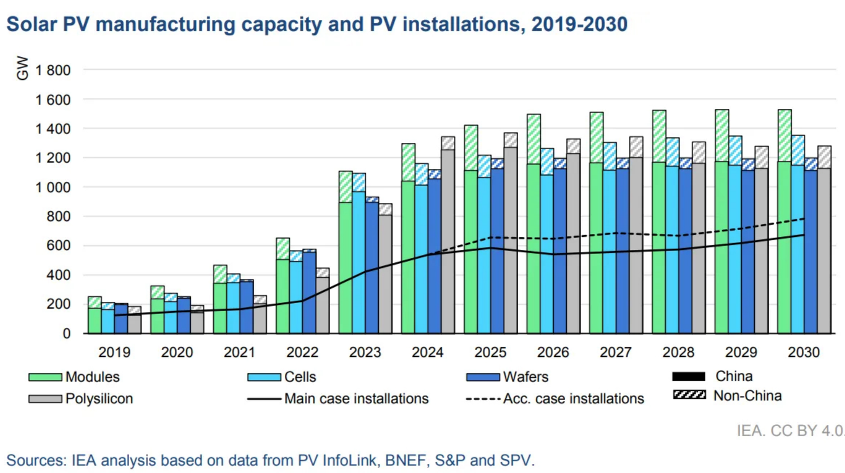

Figure 8. Annual installations and global installed capacity of the solar photovoltaic industry, 2019–2030. Source: IEA

If the figures presented so far seemed sufficiently conclusive, the competitive landscape becomes even more complicated when the spectre of excess installed capacity across these industries from 2022 onwards looms large. The IEA states that global excess production capacity in the photovoltaic industry (see also figure 9) will more than double installed capacity by 2025 (1,400 GW of capacity compared to 585 GW installed) and that it forecasts this excess will persist for the remainder of the decade. Most of the excess capacity is currently concentrated in China. If we compare the installation of new photovoltaic capacity in China in 2024 (340 GW) with its installed module capacity (1,000 GW), we see that domestic demand covers only a third of its installed capacity, and that it therefore needs to rely on exports to survive. Hence the price cut experienced by modules in Europe between 2022 and 2025, which fell from USD 0.35 per watt in 2022 to USD 0.12 (IEA, 2025f). Faced with import tariffs that bar them from the US market, and the small scale of European demand (10% of China's in 2024), Chinese manufacturers have begun flooding the markets of developing countries (see the case of Pakistan) with their modules.

The battery sector faces the same challenge of overcapacity as the solar photovoltaic sector, with capacity forecasts for 2030 (IEA, 2024) doubling annual battery installations, both in the automotive sector and in energy storage. The IEA forecasts a global battery manufacturing capacity of around 8,000 GWh by 2030 (see chart), of which 5,500 GWh would be on Chinese soil. The projected demand by then is less than 4,000 GWh, with 3,400 GWh for electric vehicles and 400 GWh for energy storage. The reduction in average prices of battery *packs* over the last three years (barely 36% according to BloombergNEF) has not been as marked as for solar panels. However, the price of batteries (dollars per kWh) in Europe and the United States ended 2025 44% and 56% higher than Chinese prices, respectively. As the cost of the battery accounts for between 30% and 40% of the cost of an electric vehicle, this price difference represents a very significant competitive advantage for the Chinese automotive sector.

The realisation that excess installed capacity in key industrial sectors for the energy transition was here to stay led to the conclusion that Western companies would be unable to compete with large Chinese firms, which, with their unrivalled economies of scale and vertical integration, would eventually decimate their competitors in the developed world. This market dynamic had already played out on European soil in the solar photovoltaic sector, which grew rapidly on the back of German and Spanish subsidies during the first decade of this century. Today, there is not a single major European company left in the sector. Faced with the risk of history repeating itself in industrial sectors as significant as the automotive industry, the US Government first (2022), and the European Commission later (2024), promoted legislation offering incentives for investment in new low-carbon technologies, provided that a minimum threshold of 'Made in America' or 'Made in Europe' content was met.

The Biden administration took the first step in the summer of 2022 with the Inflation Reduction Act (IRA), which provided tax credits and grants for investment in a wide range of green technologies, from solar photovoltaics and offshore wind to nuclear energy, green hydrogen, batteries and carbon capture. The provisions of the Act caused alarm in the EU because the combination of extremely generous tax breaks with the 'Made in America' requirement would attract substantial investment to the US that would otherwise have gone to Europe. The EU responded to the IRA with the far less effective Net Zero Industry Act (May 2024), which set a target of 40% European content by 2030, and with the Critical Raw Materials Act (April 2024), which aimed to diversify the risk in supply chains for raw materials key to the energy transition. The Trump administration's One Big Beautiful Bill (OBBB) cancelled many of the IRA's tax credits in 2025 but maintained incentives for investment in new manufacturing industries (batteries, critical mineral processing, solar components), reinforcing 'Made in America' provisions and restrictions on foreign entities.

How has Chinese industry reacted to these laws that favoured domestic production over imported goods? By effectively setting up operations on home soil. In the words of the IEA (2025d): 'The European Union is the main destination for foreign investment by Chinese battery producers, whose share in the region could quadruple, rising from less than 10% in 2024 to over 30% in 2030' (see figure 9). The Agency adds that whilst 'these investments represent an opportunity for technology transfer and cost

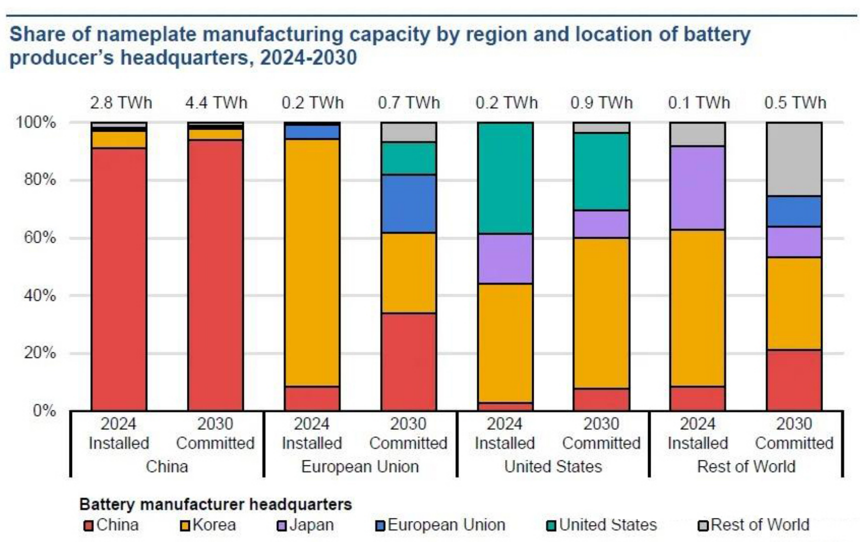

Figure 9. Battery production capacity by geography and manufacturer's country of origin, 2024–2030. *Source*: IEA

reduction in the region [...], concerns are growing about the ability of small European producers to grow and compete with established global players'. The prime example of this concern was the bankruptcy in November 2024 of the Swedish battery company Northvolt, which had raised a record USD 15 billion in equity and debt. Despite having purchase orders worth USD 55 billion from various European manufacturers, it was unable to operate its Swedish factory at more than 1% of its theoretical production capacity.

As the IEA notes, the establishment of Chinese companies within the European industrial fabric presents an opportunity for technology transfer in sectors where European industry lags far behind its Chinese counterpart. After all, it is the same process, with the roles reversed, that took place on Chinese soil from the 1980s onwards, whereby major companies from the developed world set up operations in China through joint ventures with local firms. The challenge at hand is whether, in a market economy without state intervention such as the European one, the technology transfer mechanisms that operated in turn-of-the-century China—and which were the seed from which today's Chinese tech giants grew—can be replicated. In this regard, the recent dispute (also in October 2025) between the Dutch government and the Dutch company Nexperia, a subsidiary of the Chinese firm Wingtech—a multinational operating in the semiconductor sector—is highly illustrative. This dispute highlighted Europe's vulnerability in the face of Chinese companies operating within its own jurisdiction.

The Nexperia affair hit the headlines last October when the Dutch government decided to intervene in the company following reports that its Chinese parent company was 'draining' its technological capabilities. Nexperia, which had passed into Chinese hands in 2017, manufactures chips for the European automotive industry and operates its own factories in China, where the wafers manufactured in the Netherlands are assembled. The Dutch government's intervention came as a result of US pressure over suspicions that Nexperia was being used by its Chinese parent company to export dual-use microprocessors to China through the back door, even though these were not part of its product catalogue. Nexperia's semiconductors are essential for the operation of a car (which may incorporate hundreds of them), but they are not advanced microprocessors. This intervention led to a retaliatory decision by the Chinese Ministry of Commerce

(MOFCOM) to ban the export of Nexperia's chips from its Chinese subsidiary back to the Netherlands. Furthermore, Nexperia halted the shipment of wafers to its Chinese factories, which had been ordered not to follow the instructions of their Dutch parent company following the government's intervention. All this resulted in an abrupt disruption of the supply chain that brought European car manufacturers to the brink of halting their production lines. Faced with such a threat, the Dutch government decided to end its intervention in the company in November, and Nexperia's Chinese subsidiary resumed exporting chips to its Dutch parent company.

The parallels between this case and the export controls on rare-earth permanent magnets are striking. In both instances, these are components whose economic value is minuscule compared to the value of the end products they form part of, yet without them, nothing works. Nexperia was sold to a group of Chinese investors in 2017 for USD 2.75 billion. Given how a company of that size has managed to put an entire industry such as the European automotive sector in check, the Dutch authorities (or the US CFIUS) would not have permitted the sale of Nexperia to a Chinese-owned company today.

Conclusions

It is very difficult for the Americans and Europeans to chart a course to reduce the dominance of Chinese companies in industrial sectors so crucial to the energy transition. The Biden administration's commitment to its 'Inflation Reduction Act' (subsequently scaled back significantly by Trump) showed clear signs of a resurgence in new investment projects in the solar, wind, battery, nuclear fission, green hydrogen and carbon capture industries. Goldman Sachs estimated that the potential for subsidies and tax credits could exceed one quintillion dollars over ten years, mobilising total investments of more than three quintillion dollars by 2032. Leaving the IRA aside, both the Trump and Biden administrations have been in favour of decoupling from China, closing the US market to imports of photovoltaic panels and electric vehicles, for example, by imposing very high import tariffs. The 20% drop in Chinese exports to the US in 2025 is further evidence of the decoupling of the two economies.

The EU has sought to emulate Biden's IRA with the Net Zero Industry Act, but without Washington's fiscal muscle or the US's capacity to mobilise private capital and technological innovation, its impact to date has been far less significant. With the 'Critical Raw Materials Act' and the RESourceEU plan, the EU has taken a first step towards diversifying its sources of supply for critical minerals, for which it will need to forge alliances with third countries that will take many years to bear fruit, as Japan has done. With regard to China, and unlike the US, the EU has not closed its markets to Chinese products, and so the European energy transition has benefited from the "imported productivity gains" from the Chinese economy, thanks to the lower cost of its products, be they solar panels, power electronics, batteries or electric vehicles. However, in 2024, Chinese exports to Europe were two and a half times higher than European exports to China and, according to figures published by the Chinese authorities on the 2025 trade balance, the EU overtook the US as the top destination for its exports, accounting for 15% (USD 560 billion) of the total, compared to 11% for the United States. The EU faces the dilemma of how much to protect its industry from Chinese competition, starting with the automotive sector (thirteen million jobs and 7% of GDP), without slowing down or making the energy transition more expensive.

The impressive trade surplus figures for 2025, which have broken through the USD 1 quintillion mark, seem to suggest that Xi Jinping's China will maintain its commitment to a growth model based on investment and self-sufficiency in advanced technologies, all financed by massive exports and the devaluation of the yuan. The European Union Chamber of Commerce in China, in its report *Dealing with Supply Chain Dependencies* (December 2025), advises European companies to diversify their supply chains outside China, because if China maintains its aggressive trade stance, it is highly likely that market disruptions such as those seen last year will become the norm rather than the exception. But this is no longer just about supply chain security; it is about a broader concept: the EU's economic security. Indeed, the Nexperia affair and last October's litmus test regarding export controls on rare earths and batteries serve as a warning that the playing field is not level. Beyond the World Trade Organisation's common toolkit, China has other tools at its disposal that are not part of the European Union's kit.

At this stage, it is clear that enhancing the EU's economic security will involve restricting trade with China and seeking alternative supply chains, which will undoubtedly be more expensive and less efficient in the early stages. This will result in higher costs for key technologies for the energy transition, where dependence on China is particularly high. Just as with Germany and Central Europe regarding Russian gas, Europe as a whole has reached levels of risk concentration with Chinese industry that are incompatible with its economic security. And the solution, as with Russian gas, will entail higher costs. But unlike the gas crisis, the EU will not manage to reduce its excessive dependence on the Chinese hegemon in two years, nor even in two decades. It is a far more complicated undertaking, in which each industrial sector will require different approaches and distinct strategies. The EU must seek alliances (such as the recently signed agreement with Mercosur) with third countries also keen to reduce their dependence on China, not only to diversify their access to natural resources, but also to create a new industrial fabric and alternative supply chains. And it would be good news if Europe could join forces in the medium and long term with the United States (which does not seem easy in the short term) and together force China to change the course of its growth model.

Bibliography

Argus Media. (2023). Argus White Paper: Diversifying rare earths: Building a market, not just a supply chain [online]. *Argus Media.* [Accessed: 2026]. Available at: https://view.argusmedia.com/rs/584-BUW-606/images/MET-2023-09-WP-Diversifying%20Rare%20Earths%20Copy.pdf

—. (2025). Argus launches new prices for rare earth magnets [online]. *Argus Media*. [Accessed: 2026]. Available at: https://www.argusmedia.com/es/news-and-insights/market-insight-papers/argus-launches-new-prices-for-rare-earth-magnets

Bobba, S. *et al*. (2020). *Critical Raw Materials for Strategic Technologies and Sectors in the EU*. European Commission, Publications Office.

Energy Institute. (2025). *Statistical Review of World Energy* [online]. Energy Institute. [Accessed: 2026]. Available at: https://www.energyinst.org/statistical-review

European Chamber. (2025). *Dealing with Supply Chain Dependencies: Challenges and Choices* [online]. European Union Chamber of Commerce in China. [Accessed: 2026]. Available at: https://europeanchamber.oss-cn-beijing.aliyuncs.com/upload/documents/documents/Dealing _with_Supply_Chain_Dependencies_Challenges_and_Choices[1377].pdf

European Commission. (2025). Commission selects 47 Strategic Projects to secure and diversify access to raw materials in the EU. Brussels, European Commission.

European Court of Auditors. (2024). *Security of the supply of gas in the EU*. European Union, European Court of Auditors.

Iea. (2024). *Batteries and Secure Energy Transitions* [online]. Paris, IEA. [Accessed: 2026]. Available at: https://www.iea.org/reports/batteries-and-secure-energy-transitions

—. (2025a). *Gas 2025* [online]. Paris, IEA. [Accessed: 2026]. Available at: https://www.iea.org/reports/gas-2025

—. (2025b). *Global Critical Minerals Outlook 2025* [online]. Paris, IEA. [Accessed: 2026]. Available at: https://www.iea.org/reports/global-critical-minerals-outlook-2025

—. (2025c). *Global Energy Review 2025* [online]. Paris, IEA. [Accessed: 2026]. Available at: https://www.iea.org/reports/global-energy-review-2025

—. (2025d). *Global EV Outlook 2025* [online]. Paris, IEA. [Accessed: 2026]. Available at: https://www.iea.org/reports/global-ev-outlook-2025

—. (2025e). *Oil 2025* [online]. Paris, IEA. [Accessed: 2026]. Available at: https://www.iea.org/reports/oil-202

—. (2025f). *Renewables 2025* [online]. Paris, IEA. [Accessed: 2026]. Available at: https://www.iea.org/reports/renewables-202

Institute for Energy Economics and Financial Analysis (IEEFA). (2025a). EU Gas Flow Tracker [online]. IEEFA. [Accessed: 2026]. Available at: https://ieefa.org/eu-gas-flows-tracker

—. (2025b). European LNG Tracker [online]. IEEFA. [Accessed: 2026]. Available at: https://ieefa.org/european-lng-tracker

Japan Organization for Metals and Energy Security (JOGMEC) [online]. (n.d.). Japan Organization for Metals and Energy Security. [Accessed: 2026]. Available at: https://www.jogmec.go.jp/english/

Joint Research Centre (JRC). (2024). *Security of Supply Dashboard*. European Commission.

Rare Earth Industry Association (REIA) [online]. (n.d.). Rare Earths Industry Association AISBL. [Accessed: 2026]. Available at: https://global-reia.org/rare-earth/

Safe Centre for Critical Minerals Strategy. (2025). *Resources for Resources: Financing Critical Minerals Supply Chains* [online]. SAFE Centre for Critical Minerals Strategy. [Accessed: 2026]. Available at: https://secureenergy.org/wp-content/uploads/2025/01/SAFE-Center-for-Critical-Minerals-Strategy-Resources-for-Resources-Financing-Critical-Mineral-Supply-Chains-FINAL.pdf

Us Geological Survey. (n.d.). Rare Earths Statistics and Information [online]. US Geological Survey. [Accessed: 2026]. Available at: https://www.usgs.gov/centers/national-minerals-information-center/rare-earths-statistics-and-information

Chapter Six

The Maghreb in 2025. Navigating domestic challenges and regional and international changes

Miguel Hernando de Larramendi

Abstract

This chapter reflects on the Maghreb states, their internal challenges and how they are navigating the transformations of an international context marked by the erosion of multilateralism, the crisis of the liberal order and the weakening of Western democratisation agendas—trends reinforced following Donald Trump's return to the US presidency in 2025. In this context, there is a growing focus on diversifying alliances, avoiding exclusive alignments, and adapting foreign relations to a pragmatic approach aimed at defending national interests. At the regional level, the structural rivalry between Algeria and Morocco, centred on the dispute over Western Sahara and competition for leadership in the region, continues to block Maghreb integration, reactivates the logic of blocs in the region and projects the rivalry towards the Sahel.

Keywords

Maghreb, Multi-alignment, Regional fragmentation, Western Sahara, Algeria-Morocco rivalry.

Introduction

This chapter reflects on the Maghreb states, their internal challenges and how they navigate, from within the region, the transformations of an international context marked by the erosion of multilateralism, the crisis of the liberal order and the weakening of Western liberalisation and democratisation agendas. These have given way to more pragmatic and short-term priorities, focused on ensuring cooperation on migration and security matters against a backdrop of the West's loss of moral authority in Gaza, the selective application of international law in Ukraine, and the breakdown of the principle of state sovereignty, as reflected in the United States' intervention in Venezuela.

On the domestic front, the anti-authoritarian protests of 2011 known as the 'Arab Spring' and their subsequent extensions in 2016 (the Hirak in the Rif) and 2019 (the Algerian Hirak) highlighted the deepening of social, economic and territorial inequalities and the questioning of regimes and governance mechanisms. Maghreb regimes have demonstrated their resilience through reforms that have not altered authoritarian structures (Morocco and Algeria) and through the re-establishment of authoritarian rule in Tunisia following the election of President Kaïs Saïed in 2019. In Libya, the political and territorial fracture that began following the civil war triggered by the 2011 revolution against Colonel Gaddafi continues.

Domestically, there is a rollback of civil liberties, increased repression and a narrowing of spaces for dissent, with weakened civil societies that are, in many cases, deprived of external resources following the dismantling of USAID by the Trump administration and the reduction of cooperation budgets by countries such as Germany, the Netherlands and Sweden (Lynch, 2025). This authoritarian and technocratic governance (Barreñada, 2023) has failed to address the structural problems of social justice and economic and territorial inequalities that fuelled the anti-authoritarian protests over the past decade. The persistence of the root causes of this discontent is what has driven the 2025 mobilisations of Gen Z 212 in Morocco, which question the large-scale investments in sports infrastructure carried out by the government led by Aziz Akhannouch to the detriment of sectors such as healthcare and education (Colin, 2025). In Tunisia, political mobilisations against Kaïs Saïed's authoritarian populism have been accompanied by protests in the suburbs against the environmental degradation caused by the phosphate processing industry in Gabès (Ben Hamadi, 2025). In Algeria, social unrest has led to an increase in the number of Algerian migrants reaching the Spanish and European coasts (Kessous, 2025).

At the regional level, the Maghreb is facing changes in the international environment in a fragmented manner. Rivalries, bilateral conflicts and mistrust are having an impact on shared political and security challenges, such as the dispute over Western Sahara, the conflict in Libya and instability in the Sahel. The intensification of the rivalry between Algeria and Morocco is hampering the prospects for greater political and economic integration in a region that already has one of the lowest levels of intra-regional trade in the world, with less than 5% of trade taking place between its own countries (Liga, 2023). In a context where the Maghreb is seeing its importance as an energy supplier to Europe reinforced by the war in Ukraine and Europe's commitment to climate neutrality, the lack of regional integration remains a key obstacle to its development, stability and the exploitation of opportunities offered by the trend towards the regionalisation of globalisation.

At the international level, one can observe how the trend towards selective disengagement from traditional partners has been gaining momentum, seeking to diversify partners and alliances in line with national interests. This distancing, which is often more rhetorical than real, has been encouraged by the United States' selective withdrawal from the region, the shift in the European agenda towards migration and security issues, and the waning appeal of its regional project in the Mediterranean.

This trend, previously highlighted by Fernández Molina (2019) and Fabiani (2021) and reinforced following Russia's invasion of Ukraine in 2022, has become firmly established following Donald Trump's second arrival at the White House in January 2025. The Maghreb is not mentioned once in the National Security Strategy published in November 2025. The section on the Middle East confirms the US disengagement from the region, which has ceased to be a key supplier of hydrocarbons for the United States, and confirms the abandonment of policies promoting democracy, stating that 'the key to successful relations [...] accepting the region, its leaders and its nations as they are, while working together on in areas of common interest'. The strategy highlights the Trump administration's clear interest in extending the Abraham Accords—through which Israel has normalised relations with the United Arab Emirates, Bahrain, Morocco and Sudan—to more nations in the region and the Islamic world. The Maghreb countries are also not mentioned in the section dedicated to Africa, which advocates prioritising trade and investment relations with countries that open their markets to US goods and services, with investments in the energy sector and critical minerals.

The Russian invasion of Ukraine shifted the priority of the European Union's international agenda towards the East, against a backdrop of socio-economic vulnerability in the southern Mediterranean countries, which was exacerbated during the COVID-19 pandemic. Although the European Union has sought to balance its relations with its southern neighbours through the adoption of a new regional pact for the Mediterranean, its content confirms Brussels' abandonment of its liberal and democratising agenda in the region. The new pact approved in November 2025 can be seen as a scaled-back attempt to revive the Euro-Mediterranean process launched thirty years ago in Barcelona, in an international and regional context then very different from the current one, in which the European Union faces an existential crisis due to the war in Ukraine and the risk of losing the US defence umbrella (Roggero, 2025).

Added to this is the European Union's loss of credibility among Maghreb societies, whose demands for mobility remain unmet by a European Union obsessed with immigration control. Mobility partnerships remain conditional upon the signing of readmission agreements for irregular migrants arriving in Europe from the southern shores of the Mediterranean. Restrictions on mobility contribute significantly to the deterioration of the European Union's image among the middle classes and elites—the main applicants for visas—as does the double standards applied in the treatment of refugees depending on the origin of the conflict. The speed and flexibility with which reception mechanisms were activated for Ukrainian refugees in 2022 contrast with the treatment meted out in 2015 to those fleeing Syria, or with the evacuation in November 2023 of only foreigners or Palestinians holding foreign passports from the Gaza Strip (Hernando de Larramendi y Azaola, 2024). This deterioration in the EU's image is also fuelled by the lukewarm response to the genocide in Gaza, with the EU unable to speak with one voice in condemning the disproportionate nature of the Israeli response following the attacks carried out by Hamas on 7 October 2023, nor to condemn Israel's use of starvation as a weapon of war.

1 The Maghreb in the face of shifts in the international order. Multi-alignment, transactionalism and assertiveness

On the international stage, the Maghreb states are addressing the transformations of the international order in a fragmented manner by recalibrating their foreign policies. Against a backdrop of the international system's restructuring, Maghreb regimes seek to strengthen their autonomy and pragmatically diversify their foreign relations, emphasising the defence of national interests (Ghanem, 2025). Separately, they are attempting to capitalise on the opportunities offered by the trend towards a regionalisation of globalisation, which has intensified following COVID-19 and been reinforced by the Trump administration's return to trade protectionism. By leveraging the flexibility of their environmental regulations and the free trade agreements signed with the European Union, they are highlighting their location as a gateway to European markets to attract foreign investment. They are also seeking to exploit their geographical location as a gateway to emerging African markets and as providers of security and stability in the Sahel, an area increasingly perceived by the European Union as its southern border.

In recent years, a number of general trends can be identified in the international discourse and behaviour of the Maghreb states, which have become more pronounced since the inauguration of Donald Trump's second presidential term in January 2025.

Firstly, there is a trend towards selective disengagement from historical partners such as the European Union, which has intensified following the Russian invasion of Ukraine in 2022. The Maghreb states are calling for greater involvement in defining the framework of their relations with the European Union. Morocco and Tunisia are distancing themselves from Brussels' proposal for new Comprehensive and Deep Free Trade Agreements due to the impact that a reciprocal opening of markets would have. Algeria, whose geopolitical significance as a supplier of natural gas has since been reinforced, is keeping its distance from the cooperation initiatives launched by Brussels with the countries of the Southern Neighbourhood. In addition to its reservations regarding the European Neighbourhood Policy, which it did not fully adopt until 2017 with the adoption of the Common Priorities of the Partnership, there is its desire to renegotiate the Association Agreement signed in 2005.

This disengagement is more evident in rhetoric than in strictly material terms, as levels of economic (inter)dependence have remained unchanged. The European Union remains the main trading partner of the Maghreb states. In 2024, Morocco accounted for 59% of trade with the European Union, Tunisia for 54.8%, Algeria for 48%, Libya for 42.5% and Mauritania for 32.8%. However, its power and normative appeal have weakened, and the North African states are asserting a degree of autonomy—at least rhetorically—through which they seek to avoid unconditional alignments, considering that these offer limited benefits for their survival and the defence of national interests. Consequently, they are diversifying their partners and alliances by exploring new frameworks for cooperation, such as that offered by the BRICS, which Egypt joined in 2024 and which Algeria attempted, unsuccessfully, to join.

The growing presence of China and Russia and the increasing influence of regional powers—the United Arab Emirates, Qatar, Saudi Arabia, Turkey and Israel—competing to gain influence in a region whose geopolitical importance has been reinforced by its role as a bridge between Europe and sub-Saharan Africa—enable the Maghreb states to diversify their political and economic relations they prioritize the defense of national interests through a multi-alignment approach in areas such as infrastructure development, military cooperation, and trade relations. The European Union is no longer regarded as the default ally, and the Maghreb states are taking advantage of the existence of a range of potential options (Cherif, 2025).

This assertion of autonomy, moving away from unconditional alignment with the United States and the European Union, was evident in the votes held at the UN general Assembly to condemn the Russian invasion of Ukraine. It is also evident in the rejection of the sanctions against Moscow demanded by European partners. Morocco has continued to import Russian diesel, re-exporting part of it to Europe (Horner, 2023), and signed a new fisheries agreement with Moscow in October 2025 that includes the waters of Western Sahara (Cembrero, 2026). Despite differences with Russia over the presence of military entities such as Wagner or the Africa Corps in Libya and Mali, Algeria renewed in 2023 the strategic partnership signed in 2001, coinciding with the official visit of Algerian President Abdelmajid Tebboune to Moscow. Algeria has also begun to redirect its wheat imports from France towards Russia and other Eastern European countries in response to Paris's open support for Morocco on the issue of Western Sahara (Meddeb, 2025). Tunisia, for its part, has stepped up its imports of Russian grain and oil and has promoted electoral cooperation by allowing Russian observers to attend the 2024 presidential elections, whilst rejecting the presence of Western electoral observers (Bobin and Gasteli, 2024). The two opposing governments in Libya maintain relations with Russia. In the east of the country, the close ties between Marshal Haftar's Libyan National Army and Moscow have been consolidated following the fall of Bashar al-Assad in Syria in December 2024. The subsequent transfer of military personnel from Syria to Libya, has reinforced the role of this territory as a platform for projection into the Sahel. In the west, the Tripoli-based Government of National Unity also maintains a pragmatic relationship with Russia. In this context, a barter system in which unrefined Libyan oil is exchanged for Russian diesel enables both parties to reexport these resources via the black market. This generates a steady flow of revenue for armed groups affiliated with rival factions (Tani and Saleh, 2025).

All the Maghreb states have joined the Belt and Road Initiative, known as the New Silk Road (and have signed agreements with China) (Zoubir, 2025). Since 2013, China has been Algeria's main trading partner, where, amongst other projects, it has built Algiers Airport, the capital's Grand Mosque and a section of the east-west motorway (Chabouni, 2023). In 2025, the two countries signed a dozen agreements in sectors such as the automotive industry, construction, mining and energy. One of the main projects is the collaboration on the exploiting the Gara Djebilet iron ore mine and the construction of the railway line that will connect this mega-deposit in southern Algeria with Oran via Tindouf and Béchar. Importing Algerian iron ore will allow China to diversify its reliance on imports from Australia. China is also Mauritania's main trading partner. Chinese investment in Morocco has increased in recent years, with a focus on high value-added sectors such as renewable energy, the automotive industry and electric batteries. This investment seeks to access European markets via free trade zones and circumvent Western tariffs by taking advantage of the free trade agreements Morocco has in place with the European Union and the United States (ChinaMed Project, 2025). Chinese companies have secured a significant share of the contracts for the construction of the new high-speed rail line between Kenitra and Marrakech. In November 2024, President Xi Jinping made an unexpected stopover in Casablanca on his return from the G-20 summit held in Brazil. In September 2025, both countries signed a strategic dialogue mechanism between their foreign ministries, building on the Strategic Partnership signed in 2016.

Coinciding with Kaïs Saïed's official visit to Beijing in May 2024, both countries signed a strategic partnership agreement aimed at boosting cooperation in infrastructure and energy construction. Chinese cooperation has also been sought to address the refurbishment of the phosphate production and processing units of the Tunisian Chemical Group, which are responsible for the environmental degradation that sparked a wave of protests in Gabès in the autumn of 2025.

The weakening of the European Union's transformative agenda in the Mediterranean replaced by specific agreements linked mainly to migration and security issues have been accompanied by a strengthening of transactional logic, capitalising on the negotiating power afforded by Brussels' prioritisation of the externalisation of control over its external borders (Fakir, 2025a).

Most Maghreb states have agreed to assume the role of 'border police' in exchange for economic and political concessions enshrined in migration agreements (Tunisia, 2023; Mauritania and Egypt, 2024). Through these agreements, the states secure concrete benefits that go beyond migration cooperation. The EU's focus on these agreements gives it leverage in its relations with European states, enabling them to secure rapid concessions while bypassing the logic of political conditionality present in the European Neighbourhood Policy, which is increasingly viewed as interference. Although Morocco has not signed a migration agreement, its status as a key security partner and an indispensable partner for controlling migration flows in North-West Africa has strengthened its negotiating power in relations with Brussels. By linking the issues under negotiation, the Moroccan authorities seek to secure funding for border control—an increasingly politicised issue in Europe—ward off criticism on issues linked to human rights or scandals such as the bribery of MEPs and European Parliament officials. Additionally they hope to secure backing for ways to circumvent the rulings of the Court of Justice of the European Union, which annulled the 2024 Trade Agreement on the grounds that the consent of the people of Western Sahara was an essential condition for its application in that territory. In Libya, the memorandum of understanding signed in 2017 between the Government of National Unity and Italy to control migration flows has provided the authorities in Tripoli with significant leverage, which in January 2025 resulted in the release by the Italian authorities of the head of the judicial police, who was in charge of a migrant detention centre and against whom an arrest warrant had been issued by the International Criminal Court (Domínguez, 2025).

The acceptance of this subordinate role in migration management has not prevented the reinforcement of discourses emphasising sovereignty and decision-making autonomy. The claim of "economic sovereignty" was the argument used in 2021 by Tunisia to freeze negotiations on the Comprehensive and Deep Free Trade Agreement (ALECA) proposed by the EU, on the grounds that free competition in sectors such as agriculture and services in economies that are not on an equal footing would be disastrous for the country. That same argument was invoked in 2023 by President Kaïs Saïed to reject the conditions set by the International Monetary Fund for granting a credit line of 1.9 billion dollars, opting instead for other bilateral alternatives and resorting to domestic borrowing.

The priority given to defending national interests has been accompanied by a trend towards greater assertiveness in international conduct when interests diverge, thereby reinforcing their sense of agency. The use of assertive policies based on the idea of sovereignty is an ongoing process subject to trial and error, which explains why results vary greatly from one country to another. In the case of Morocco, for example, this takes the form of a foreign policy that has resorted to triggering diplomatic crises with its traditional partners. These have been used as instruments of pressure to achieve political objectives in its attempts to replace the international framework of decolonisation for the resolution of the Western Sahara dispute with an administrative one through autonomy under Moroccan sovereignty (Fernández-Molina *et al.*, 2023). This assertiveness led it to suspend institutionalised political dialogue with the EU between 2016 and 2019, which affected intelligence cooperation (Fakir, 2025b), which is crucial for countering terrorist attacks in response to the rulings of the Court of Justice of the EU that annulled trade and fisheries agreements for including the territory and waters of Western Sahara within their scope. The US recognition of Moroccan sovereignty over Western Sahara in December 2020, in exchange for Morocco establishing diplomatic relations with Israel and joining the Abraham Accords, bolstered Morocco's resolve through a diplomatic approach that makes relations with other countries contingent on their positions on the Western Sahara issue. In this context, Rabat's offensive to undermine the international consensus must be situated, involving the provocation of diplomatic crises with Germany (2020), Spain (2021) and France (2022) in order to secure their backing for its proposal for autonomy under Moroccan sovereignty in Western Sahara (Fernández-Molina *et al.*, 2023). It is also within this framework that we must view the entry into Ceuta in May 2021 of nine thousand Moroccan citizens, fifteen hundred of whom were unaccompanied minors, as a means of exerting pressure to secure the Spanish Government's backing for the Moroccan autonomy plan in Western Sahara.

Algeria, for its part, has also demonstrated assertiveness in responding to the Spanish government's shift on the Western Sahara issue by suspending, in June 2022, the Treaty of Friendship, Good Neighbourliness and Cooperation, and by freezing non-energy exports and imports with Spain. Algeria adopted the same trade reprisal against France after Paris, in July 2024, described the Moroccan autonomy plan as 'the sole basis' for resolving the conflict over Western Sahara. In Tunisia, this behaviour can be seen in the decision to expel members of the Venice Commission, the Council of Europe's advisory body on constitutional matters, in response to their criticism of the process of drafting the new 2022 Constitution, which Kaïs Saïed described as 'interference in Tunisia's internal affairs' and an 'attack on the country's sovereignty'.

In their relations with the European Union, the Maghreb states are taking advantage of the opportunities offered by the fragmentation of European action in the region, which is governed *de facto* not by Brussels but by the capitals of southern Europe, each with their own priorities and interests that do not always coincide. For example, in July 2023, during negotiations on the Comprehensive Strategic Partnership Memorandum of Understanding between Tunisia and the European Union, Italy's vision prevailed, whereby Tunisia committed to strengthening migration controls in exchange for economic concessions, without including references to the issue of human rights as demanded by some northern European countries (Cherif, 2025). The effectiveness of Tunisia's measures to combat illegal migration has reduced the number of irregular migrant arrivals. In the first eleven months of 2025, Italy recorded around 4,500 arrivals from the Tunisian coast. In the same period of 2023, the figure was 96,000—twenty times higher.

By embracing the European framework for externalising borders, Kaïs Saïed has managed to limit criticism from Brussels regarding the regime's increasingly repressive tendencies, which were exacerbated in 2025 by the imprisonment and sentencing of virtually all opposition political leaders. The assumption of this subordinate role, which contradicts his rhetoric on the country's autonomy, is offset by the revival of a sovereignist narrative for domestic consumption which, however, does not call into question relations with Brussels. It is within this framework that we must situate, for example, the reprimand issued in November 2025 to the European Union ambassador by the President of the Republic, on the grounds that he had failed to respect diplomatic protocol by meeting with the general secretary of the country's main trade union, the UGTT, against a backdrop of tensions arising from the deterioration of the social and political situation. The rhetoric regarding regained national dignity *vis-à-vis* the European Union, reiterated following the adoption in November 2025 of a European Parliament resolution on the rule of law and human rights in Tunisia, did not prevent the Tunisian Assembly of People's Representatives from passing, a few weeks later, three bills that expanded and revised the content of the existing free trade agreement.

The diversity of interests in the Maghreb among the countries of southern Europe allows Maghreb capitals to capitalise on these differences. At times of bilateral tension with one of them, relations with the others are prioritised. This is what Morocco did during the diplomatic crisis with France between 2021 and 2024. The rift between France and Morocco was fuelled by reports of alleged Moroccan espionage using the Pegasus programme, which is said to have targeted President Macron and twelve other ministers, and by Paris's rapprochement with Algeria, symbolised by Macron's state visit to that country in August 2022. The deterioration in Franco-Moroccan relations enabled the Spanish government, which had just changed its position on Western Sahara, to be recognised as a privileged partner by Rabat. Following the earthquake that devastated the Haouz region in September 2023, the Moroccan government rejected the aid offered by France, but accepted that of Spain, along with that of the United States, the United Kingdom, the United Arab Emirates and Qatar. The subsequent reconciliation between France and Morocco in July 2024, following Paris's endorsement of Moroccan sovereignty over Western Sahara, triggered a crisis with Algeria, which the Algerian authorities exploited to deepen their relations with Italy, making it their privileged European partner in energy matters.

In Libya, the absence of a unified stance on the civil conflict has enabled the two competing factions vying for legitimacy and control of the country to favor certain European nations over others. The internationally recognised Government of National Unity has received support from Italy in exchange for its cooperation in the fight against immigration. In the east of the country, Marshal Haftar's Libyan National Army receives backing from France (Soler, 2023).

2 The rivalry between Algeria and Morocco and the return to a logic of blocs in the regional arena

Since independence, regional dynamics in the Maghreb have been shaped by the rivalry between Algeria and Morocco. The issue of Western Sahara is one of the areas that frames bilateral relations between the two countries as a zero-sum game. This rivalry, linked to the struggle for regional hegemony, has hindered successive attempts at economic and political integration in the Maghreb, such as the Arab Maghreb Union created in 1989, and paralyzed since 1994. Although the rivalry has diminished during periods of shared vulnerability, as occurred in 2011 during the early stages of the anti-authoritarian protests known as the 'Arab Spring', it tends to intensify when the perception of vulnerability is asymmetrical (Hernando de Larramendi, 2019).

The perception that Morocco sought to capitalize on Algeria's international isolation during President Bouteflika's final terms in office, as well as the Algerian regime's internal weakness during the 2019 Hirak protest movement, intensified the countries' rivalry. This rivalry escalated into a breakdown in diplomatic relations in the summer of 2021. Algeria's decision was triggered by the perception that Morocco crossed a red line by publicly supporting the Kabyle people's right to self-determination and interfering in Algeria's internal affairs (Hernando de Larramendi and Thieux, 2022). However, underlying that decision was the issue of Western Sahara. The compromise agreement that Morocco reached with President Trump in December 2020, whereby Rabat normalized its relations with Israel in exchange for U.S. recognition of its sovereignty over Western Sahara, heightened bilateral tensions. Algeria views Morocco's accession to the Abraham Accords and the strengthening of security cooperation between Morocco and Israel as bringing the "Zionist enemy" closer to its border. One sign of the escalation was the October 2020 decision by the Algerian state-owned company Sonatrach not to renew the tripartite agreement that allowed Algerian gas to reach Spain via Moroccan territory through the Maghreb-Europe Gas Pipeline (GME). This decision cut off supplies to Moroccan combined-cycle power stations, which generated around 12% of the country's electricity, and ended the twenty-five-year contract that had allowed Algerian gas to transit through Morocco. Rabat then requested that the pipeline operate in the opposite direction to enable Morocco to receive natural gas from Spain. In March 2022, the Spanish government shifted its position, regarding autonomy as the "most serious, realistic, and credible" option for resolving the Western Sahara conflict. In response, Algeria warned of reprisals should the gas infrastructure be used to transfer even "a single molecule of Algerian gas to Morocco." (Hernando de Larramendi *et al*., 2023). The rise in bilateral tension is evident in both countries' efforts to demonstrate their military strength. This is seen through the creation of new military regions in border areas, the organization of military drills, and increased defense budgets. In 2024, defense spending accounted for 8% of Algeria's GDP and 3.5% of Morocco's.

The breakdown of diplomatic relations between Algeria and Morocco has intensified competition between the two countries in the Maghreb region. This has revived a logic of alliances that previously existed in the region during the 1980s. At that time, Algeria signed a Treaty of Fraternity and Concord with Tunisia and Mauritania in 1983. The following year, Morocco responded by signing the Treaty of Arab-African Union between Morocco and Libya. To counter Morocco's diplomatic advances on the issue of Western Sahara, Algeria has strengthened its ties with Tunisia. Isolated both regionally and internationally, Tunisia relies on Algeria to cover two-thirds of its gas consumption, for security cooperation in controlling the 1,200 kilometres of shared border, and for economic aid to alleviate the country's financial difficulties following the rejection of the International Monetary Fund's agreement. In October 2025, the two countries signed a defence cooperation agreement just weeks after a drone attack struck several ships of the Global Sumud Flotilla anchored in the port of Sidi Bou Saïd, which were heading to Gaza to break the blockade of the Strip. Tunisia's dependence on Algeria has prompted it to abandon its neutrality and align itself with Algeria within the Maghreb region. Although it does not recognise the Sahrawi Arab Democratic Republic (SADR), the invitation and official reception extended to the Secretary-general of the Polisario Front, Brahim

Ghali, in 2022 on the occasion of his visit to Tunisia to participate in the 8th Tokyo International Conference on African Development (TICAD) triggered a diplomatic crisis with Morocco that has yet to be resolved. Tunisia has also joined, alongside Libya, the alliance spearheaded by Algeria in 2024 to attempt to revitalise the Arab Maghreb Union (El Yaaqoubi, 2024). Coordination between the two countries also extends to the situation in Libya. At a trilateral meeting with Egypt in November 2025, the three countries urged all parties to 'seriously commit ' to the UN-sponsored political settlement process in order to end years of division within the country.

The interest of both Algeria and Morocco in strengthening their relations with Mauritania is part of the revival of the "axis" dynamic in the region. Due to its position as a bridge between the Maghreb and the Sahel, Mauritania holds significant geostrategic value in the regional rivalry between the major Maghreb powers. Although Mauritania has recognized the SADR since 1984, it seeks to maintain a position of "positive neutrality," striking a delicate balance between its two neighbors, who are competing to draw it into their respective spheres of influence (Lacher and Werenfels, 2025).

During Mauritanian President Mohamed Ould Cheikh El Ghazouani's three-day visit in December 2021, Algeria sought to strengthen bilateral trade relations by signing a cross-border free trade agreement and launching a project to improve connections via a road. With Algerian funding, the road will link the cities of Tindouf in western Algeria and Zouerate in northern Mauritania. In January 2024, the Algerian and Mauritanian presidents inaugurated the first permanent border post between the two states in Tindouf.

Following the fall of Colonel Gaddafi in 2011 and the French intervention in Mali, the Sahel became a new arena of competition with Algeria due to the rise in instability in the region. Both countries have promoted competing mediation initiatives to gain influence and present themselves as providers of stability and security in a region that the European Union increasingly perceives as its new security frontier.

The rivalry between Algeria and Morocco extends beyond the Maghreb to the Sahel and West Africa. The rise in instability in the Sahel following the fall of Colonel Gaddafi in 2011 and the French intervention in Mali turned the region into a new arena of competition with Algeria. To gain influence, both countries have vied with one another by promoting competing mediation initiatives, presenting themselves as providers of stability and security in a region increasingly perceived by the European Union as its new security frontier. Using the geographical argument that Morocco does not share a direct border with the Sahel countries, Algeria excluded Morocco from regional security initiatives such as the African Centre for the Study and Research on Terrorism (CAERT) or the Joint Operational Staff Committee (CEMOC). Morocco, for its part, took advantage of the vacuum created by the French and European withdrawal from 2022 onwards and Algiers' distancing itself from the military juntas that seized power following the coups d'état in Mali (2020 and 2021), Burkina Faso (2022) and Niger (2023). These three countries' creation of the Alliance of Sahel States and their withdrawal from the Economic Community of West African States in January 2025 has been exploited by Rabat to promote the Atlantic Initiative. The initiative aims to provide Rabat with access to the Atlantic Ocean via the port of Dakhla in Western Sahara. This would implicitly recognize Rabat's sovereignty over the territory. The project's success depends on incorporating Mauritania, which is an obligatory transit point for Sahel countries to access the Atlantic.

The competition between Algeria and Nigeria is also seen in two competing mega-projects, through which both countries seek to strengthen their influence in Africa and Europe by becoming transit points for Nigerian gas destined for North Africa and Europe. The importance of these projects was reinforced following Russia's invasion of Ukraine. In contrast to the trans-Saharan gas pipeline project, which would transport Nigerian gas to Algeria via Niger, Rabat has been promoting since 2016 the idea of an alternative pipeline. This pipeline would also start in Nigeria and cross the Atlantic Ocean through eleven West African countries, including Western Sahara, before reaching Morocco.

The Algerian-Moroccan rivalry has also taken a political toll on the European Union and its member states. They have been forced to navigate a zero-sum dynamic, in which any step forward in cooperation with one country is perceived by the other as a hostile gesture. In 2024, the shift in France's position—regarding the Moroccan autonomy plan as the 'sole basis' for resolving the conflict—intensified the bilateral crisis between Paris and Algiers, leading to the withdrawal of its ambassador from France and the imposition of restrictions on bilateral trade and investment.

Taking advantage of the tensions in bilateral relations with France and Spain, Italy has been strengthening its strategic partnership with Algeria, a key element of Italy’s ambitions on the African continent as set out in the Mattei Plan for Africa.

3 The impact of Trump’s second presidency

Against a backdrop of heightened rivalry between Algeria and Morocco, the start of President Trump’s second term has prompted the Maghreb states to adapt to the new landscape.

Rabat saw Trump’s return to the White House in January 2025 as a unique opportunity to secure international recognition of its sovereignty over Western Sahara. Although the Biden administration did not go so far as to reverse the recognition granted by Trump at the end of his first term in December 2020, nor did it take steps to reaffirm with concrete actions a decision that had broken with the United States” traditional position of neutrality in the dispute (Fernández-Molina, 2025).

The preferential treatment Rabat seeks in its relations with the US administration is reflected in the tariffs applied to bilateral trade. Like Mauritania, Morocco is subject to a 10% tariff, whereas Tunisia, Algeria, and Libya are subject to tariffs of 25%, and 30%, respectively. Petroleum products are excluded from these tariffs. The US trade surplus has prevented the US-Morocco Free Trade Agreement from being included on the list of treaties to be renegotiated, although the imposition of a 10% tariff on all Moroccan products clearly calls into question the spirit of the agreement signed in 2005.

Moroccan diplomacy uses the convergence of interests in the Middle East and the Sahel to bolster the country’s image as a trusted Washington ally. The Hamas attacks on October 7, 2023, and Israel’s brutal response forced the Moroccan authorities to perform a delicate balancing act to prevent an openly pro-Palestinian street movement from getting out of hand, without altering their relations with Israel. The government tolerated the protests against the genocide in Gaza, whilst Mohammed VI, chairman of the Al-Quds Committee, expressed solidarity with the people of Gaza without severing or calling into question diplomatic, economic and security relations with Israel (Casani and Colin, 2024). Nor were the Abraham Accords, which Morocco had joined in 2020, denounced. The convergence with the US administration in the Middle East was reflected once again in October 2025, when Rabat backed the ceasefire agreement in Gaza promoted by President Trump whilst reiterating its commitment to the two-state solution as the sole basis for achieving a just and lasting peace in the region. During this period, Rabat has strengthened its relations with Israel in the military and security spheres by purchasing arms, transferring technology in the aerospace sector, manufacturing drones, and authorizing ships carrying military equipment for Israel to transit through and call at Moroccan ports. At the third meeting of the Joint Military Committee in Tel Aviv in January 2026, the two countries signed a joint military work plan coinciding with the fifth anniversary of the Abraham Accords.

Through this triangulation of interests, Moroccan diplomacy seeks definitive backing from the Trump administration for its position on Western Sahara—the cornerstone of its foreign policy. In July 2025, President Trump reiterated the view that Morocco's proposed autonomy plan is "the only basis" for resolving the dispute in the congratulatory message he sent to Mohammed VI on Throne Day.US support was also evident during the drafting of Security Council Resolution 2797 on Western Sahara. The resolution was adopted on October 31, 2025, with eleven votes in favor and three abstentions (Russia, China, and Pakistan). Algeria, a non-permanent member for the 2023–2025 term, was absent. Although the initial draft drawn up by US diplomats was clearly aligned with Morocco's positions, the final adopted text the final adopted text is more ambiguous. It is the result of an arduous negotiation process intended to avoid a veto by Russia and China. This process allowed each party to emphasize the aspects most favorable to their positions . The resolution places autonomy at the centre, relegating references to the principle of self-determination to a marginal role. The resolution, which renews the mandate of MINURSO (United Nations Mission for the Referendum in Western Sahara) for one year. The resolution refers to the autonomy plan as the "basis" (without article) and "one of the most feasible solutions," leaving open the possibility of other solutions. The text of the resolution does not, however, include any reference to the proposal updated in October 2025 by the Polisario Front for a 'politically acceptable solution that guarantees the self-determination of the people of Western Sahara'. The resolution expresses appreciation to the United States of America for its willingness to host negotiations in support of the Special Envoy's mission to achieve a solution for Western Sahara and the region.

Although the resolution establishes a framework for negotiations without prescribing a specific outcome, it was welcomed with jubilation by Morocco. A few hours after its adoption, King Mohammed VI addressed the nation in a speech in which he described it as a 'new victorious chapter in the process of enshrining the Moroccan identity of the Sahara […] through a consensual solution based on the autonomy initiative'. The sovereign also announced that Morocco would proceed with the updating and detailed formulation of the autonomy proposal, which should constitute 'the sole basis for negotiation', and thanked President Trump, Britain, Spain and France for their efforts in this process. Considering it a historic milestone, he designated October 31 as a new national holiday.

Algerian diplomacy, which defends the Sahrawi people's right to self-determination, has avoided confrontation with the Trump administration despite the latter's clear support for Morocco in the Sahara dispute (International Crisis Group, 2025). Unlike the situation with Spain and France—countries with which Algeria triggered diplomatic crises following their backing of the Moroccan autonomy proposal—Algiers, mindful of the new balance of power, has adopted a conciliatory stance towards the United States, seeking to avoid confrontation with the Trump administration. During his previous term as a senator, Secretary of State Marco Rubio called for sanctions to be imposed on Algeria due to its ties with Russia. Evidence of this stance was his absence from the vote on Resolution 2797, thereby avoiding taking a stand against a US-sponsored resolution favourable to Morocco, which deviated from the guiding principles of his foreign policy.

Through his absence, Algerian diplomacy has sought to separate the dispute over Western Sahara from its bilateral relations with the United States. In addition to the conciliatory statements made by Algerian Foreign Minister Ahmed Attaf regarding U.S. mediation efforts between Morocco and the Polisario Front, Algeria voted in favor of Resolution 2803 in November 2025. The resolution was endorsed by the U.N. Security Council and supported President Trump's comprehensive plan to end the Gaza conflict. However, some sectors of Algerian public opinion rejected the resolution, perceiving it as a departure from traditional support for the Palestinian cause. (Bobin, 2025). At the bilateral level, relations focus on security and energy issues. In January 2025, Algeria signed a memorandum on information sharing with the United States Africa Command (AFRICOM) in response to the increased Russian presence in Mali and the Sahel through the Africa Corps. In September, general Claude K. Tudor, head of special operations at AFRICOM, met in Algeria with Saïd Chengriha, Chief of Staff of the Algerian Army. Military cooperation has also paved the way for the sale of US arms in a market hitherto dominated by Russia. In the energy sector, Algeria is negotiating the opening of the Algerian market to the US companies Chevron and Exxon for for exploring and exploiting its significant shale gas reserves.

The United States’ firm support for Morocco, however, is being balanced by Washington’s efforts to promote reconciliation between Algeria and Morocco as a means of strengthening regional stability by anchoring the Maghreb within the Atlantic security architecture, curbing Russian expansion in the Sahel and containing Chinese penetration in the region (Benmoumen, 2025). The tour of the Maghreb undertaken by Massad Boulos, President Trump’s senior advisor on Arab and Middle Eastern affairs, in the summer of 2025 should be viewed in this context. Discreet diplomatic efforts were formalized in October 2025 by Steve Witkoff, the Special Envoy for the Middle East. During an interview with CBS, Witkoff announced that a peace agreement would be signed between Algeria and Morocco before the end of 2025. This demonstrates the U.S.’s willingness to facilitate potential tripartite negotiations between Rabat, Algiers, and the Polisario Front once Morocco presents a revised autonomy plan for Western Sahara.

Conclusions

In the face of shifts in the international order, accelerated by Donald Trump’s second term as US president, the Maghreb states have adopted pragmatic strategies aimed at strengthening their autonomy and maximising the defence of their national interests against a backdrop of weakening multilateralism and the waning influence of Western liberalisation agendas. This adaptation translates into foreign policies based on multi-alignment, the diversification of partners and an increasingly transactional approach. This shift does not imply a material break with the European Union, which remains the region’s main economic partner, but rather a selective, fundamentally discursive disengagement aimed at broadening the scope for autonomy and negotiation in a context where levels of economic and security interdependence remain high. This process is accompanied by a more assertive approach to foreign policy, expressed through the use of diplomatic crises, pressure strategies, and sovereignist rhetoric. The mixed results and experimental nature of these strategies introduce new factors of uncertainty and volatility into relations with traditional partners and within the immediate regional environment.'

At the regional level, the Maghreb continues to be characterised by deep political fragmentation and an inability to develop collective responses to shared challenges. The structural rivalry between Algeria and Morocco, centred on the dispute over Western Sahara and the competition for regional hegemony, continues to block any significant progress towards Maghreb integration. This zero-sum logic limits not only intra-regional trade and economic development opportunities but also reactives bloc dynamics that extend bilateral competition into the Sahel and West Africa. This has direct implications for regional stability and European interests.

Bibliography

Ammari, F. and Lyammouri, R. (2025). The Atlantic Initiative and Morocco–Mauritania Relations [online]. *Policy Center for the New South*. [Accessed: 3 January 2026]. Available at: https://www.policycenter.ma/sites/default/files/2025-09/RP_09-25%20%28Rida%20Lyammouri%20%26%20Fadoua%20Ammari%29.pdf

Barreñada, I. (2023). Authoritarian technopopulism in Arab countries and international legitimisation. *CIDOB Journal of International Affairs*. No. 135, pp. 29–52. DOI: doi.org/10.24241/rcai.2023.135.3.29

Ben Hamadi, M. (2025). Tunisia: in Gabès, pollution fuels public anger [online]. *Le Monde*. [Accessed: 30 December 2025]. Available at: https://www.lemonde.fr/afrique/article/2025/11/03/tunisie-a-gabes-la-pollution-nourrit-la-colere-des-populations_6651365_3212.html

Benmoumen, B. (2025). Morocco-Algeria: the boldness of reconciliation [online]. Fondation Jean Jaurès. [Accessed: 29 December 2025]. Available at: https://www.jean-jaures.org/publication/maroc-algerie-laudace-de-la-reconciliation/

Bobin, F. and Gasteli, N. (2024). Tunisia, the focus of Russia's growing attention [online]. *Le Monde*. [Accessed: 30 December

2025]. Available at: https://www.lemonde.fr/afrique/article/2024/05/22/la-tunisie-cible-des-attentions-croissantes-de-moscou_6234820_3212.html?lmd_campaign=envoye-par-appli&lmd_creation=ios&lmd_medium=al&lmd_source=default

Bobin, F. (2025). Algeria launches a charm offensive towards the United States [online]. *Le Monde*. [Accessed: 30 December 2025]. Available at: https://www.lemonde.fr/afrique/article/2025/11/27/l-algerie-se-lance-dans-une-offensive-de-charme-vis-a-vis-des-etats-unis_6655025_3212.html

Casani, A. and Fernández-Molina, I. (2021). Morocco, a more assertive foreign policy [online]. *Política Exterior*. No. 200, pp. 66–74. [Accessed: 20 December 2025]. Available at: https://www.politicaexterior.com/articulo/marruecos-una-politica-exterior-mas-asertiva/

Casani, A. and Colin, F. (2024). Change and continuity in Moroccan solidarity with Palestine: the state and civil society in the face of normalisation and the Gaza war*. Journal of Mediterranean International Studies.* No. 37, pp. 48–70. DOI: https://doi.org/10.15366/reim2024.37.003

Cembrero, I. (2026). Russia to fish in Western Sahara waters where the EU fleet has ceased operations [online]. *El Confidencial*. [Accessed: 7 January 2026]. Available at: https://www.elconfidencial.com/mundo/2026-01-03/rusia-marruecos-acuerdo-pesca-sahara-1hms_4277801/

Colin, F. (2025). Gen Z 212 Earthquake Youth Shaking Morocco's Politics [online]. Arab Reform Initiative. [Accessed: 20 December 2025]. Available at: https://www.arab-reform.net/publication/gen-z-212-earthquake-youth-shaking-moroccos-politics/

Chabouni, S. (2023). Algerian diplomacy as a source of legitimacy: Between tradition and renewal. *CIDOB Journal of International Affairs*. No. 135, pp. 143–168. DOI: https://doi.org/10.24241/rcai.2023.135.3.143

Cherif, Y. (2025). Redefining EU-Maghreb relations [online]. *Afkar/ideas*. No. 76, pp. 28–32. [Accessed 30 December 2025]. Available at: https://www.iemed.org/publication/redefinir-las-relaciones-ue-magreb/

ChinaMed Project. (2025). Mediterranean Anxieties over the Sino-Moroccan Rapprochement: French, Algerian, and Tunisian Media Perspectives [online]. ChinaMed Project.

[Accessed: 7 January 2026]. Available at: https://chinamed.substack.com/p/mediterranean-anxieties-over-sino?utm_source=substack&utm_campaign=posts-open-in-app&utm_medium=email&r=2d3k3v&triedRedirect=true

Domínguez, I. (2025). Meloni continues to pay Libya to do the dirty work against immigration [online]. *El País*. [Accessed: 30 December 2025]. Available at: https://elpais.com/internacional/2025-11-09/meloni-sigue-pagando-a-libia-por-hacer-el-trabajo-sucio-contra-la-inmigracion.html

El Yaaqoubi, S. (2024). Maghreb Disunion: Morocco and Algeria's Divergent Strategies in Shaping Future Regional Geopolitics [online]. Wilson Center. [Accessed: 12 January 2026]. Available at: https://www.wilsoncenter.org/article/maghreb-disunion-morocco-and-algerias-divergent-strategies-shaping-future-regional

Fabiani, R. (2021). In Transition: North Africa's Long Decoupling from Europe and the US [online]. *Jadaliyya*. [Accessed: 20 December 2025]. Available at: https://www.jadaliyya.com/Details/42336/In-Transition-North-Africa's-Long-Decoupling-from-Europe-and-the-US

Fernández-Molina, I. (2019). *Global Power Shifts, Rational Choice and Role Conflict: Explaining the Trajectories of the Central Maghreb Countries" EU Policies since 2011* [online]. European Institute of the Mediterranean. [Accessed 16 December 2025]. Available at: https://www.euromesco.net/wp-content/uploads/2019/03/EuroMeSCo39_Global-Power-Shifts_Rational-Choice_Role-Conflict_Explaining-the-Trajectories-of-Central-Maghreb-Countries-EU-Policies.pdf

—. (2025). Autocratisation, Sovereignism, and Illiberal Conflict Management: Morocco's Regional Progress under Trump 2.0 [online]. *IEMed Mediterranean Yearbook 2025*. Barcelona, IEMED, pp. 216–219. [Accessed: 2 January 2026]. Available at: https://www.iemed.org/publication/autocratization-sovereignism-and-illiberal-conflict-management-moroccos-regional-progress-under-trump-2-0/

Fernández-Molina, I. and Hernando de Larramendi, M. (2020). Migration diplomacy in a de facto destination country: Morocco's new intermestic migration policy and international socialisation by/with the EU. *Mediterranean Politics*. 27(2), pp. 212–235. DOI: https://doi.org/10.1080/13629395.2020.1758449

—. (2021). *Foreign policy in North Africa: Navigating global, regional and domestic transformations*. London, Routledge.

—. (2022). The changing contours of the Maghreb and its position in the international system. In: Azaola *et al*. (eds). *Change, crisis and mobilisations in the Western Mediterranean*. Granada, Editorial Comares, pp. 1–22.

Fernández-Molina, I., Hernando de Larramendi, M. and Ojeda, R. (2023). The Western Sahara Conflict as the Chicken and Egg of the "Non-Maghreb". In: Liga, A. (ed.). *The cost of "Non-Maghreb". Unpacking the political and economic costs of disunion and divisions*. Milan, ISPI, pp. 51–177.

Fakir, I. (2025a). Sovereignty first: Reshaping international cooperation in North Africa [online]. Middle East Institute. [Accessed: 26 December 2025]. Available at: https://mei.edu/publication/sovereignty-first-reshaping-international-cooperation-north-africa/

Fakir, I. (2025b). North Africa's experiment in tactical diplomacy [online]. Middle East Institute. [Accessed: 26 December 2025]. Available at: https://mei.edu/publication/north-africas-experiment-tactical-diplomacy/

Ghanem, D. (2025). North Africa Inc.: In the Grip of Regional Reshaping [online]. *IEMed Mediterranean Yearbook 2025*. Barcelona, IEMED, pp. 163–169. [Accessed: 20 December 2025]. Available at: https://www.iemed.org/wp-content/uploads/2025/06/North_Africa_Regional_Reshaping_Ghanem_IEMedYearbook2025-1.pdf

Hernando de Larramendi, M. (2019). Doomed regionalism in a redrawn Maghreb? The changing shape of the rivalry between Algeria and Morocco in the post-2011 era. *The Journal of North African Studies*. 24(3), pp. 506–531. DOI: https://doi.org/10.1080/13629387.2018.1454657

Hernando de Larramendi, M. and Azaola, B. (2024). North Africa and the European Union: Between Economic (Inter) Dependence and Diversification of Alliances [online]. *IEMed Mediterranean Yearbook 2024*. Barcelona, IEMED, pp. 33–39. [Accessed: 10 January 2026]. Available at: https://www.iemed.org/wp-content/uploads/2024/07/North-Africa-EU-Dependence-Diversification-Hernando-de-Larramendi-Azaola_IEMedYearbook2024.pdf

Hernando de Larramendi, M. and Thieux, L. (2022). The Algeria-Morocco rivalry in a changing landscape [online]. *Afkar/ideas*. No. 67. [Accessed: 10 January 2026]. Available at: https://www.politicaexterior.com/wp-content/uploads/2022/11/07-67-Larramendi.pdf

—. (2025). The rivalry between Algeria and Morocco and its relationship with the EU [online]. *Afkar/ideas*. No. 76. [Accessed: 10 January 2026]. Available at: https://www.politicaexterior.com/articulo/la-rivalidad-entre-marruecos-y-argelia-y-su-relacion-con-la-ue/

Horner, W. (2023). North African Countries Snap Up Russian Oil Products Shunned by the West [online]. *The Wall Street Journal*. [Accessed: 5 January 2026]. Available at: https://www.wsj.com/articles/north-african-countries-snap-up-russian-oil-products-shunned-by-west-f63aa287

International Crisis Group. (2025). A Window for Diplomacy in Western Sahara [online]. *Crisis Group Middle East and North Africa Briefing*. International Crisis Group. No. 96. [Accessed: 7 January 2026]. Available at: https://www.crisisgroup.org/sites/default/files/2025-11/b096-western-sahara-window-for-diplomacy%20%281%29.pdf

Kessous, M. (2025). Youth emigration, a reflection of Algeria's malaise [online]. *Le Monde.* [Accessed: 5 January 2026]. Available at: https://www.lemonde.fr/idees/article/2025/11/27/l-emigration-des-jeunes-reflet-du-malaise-algerien_6655074_3232.html

Lacher, W. and Werenfels, I. (2025). Mauritania's Balancing Act amid Intensifying Algerian-Moroccan Rivalry [online]. SWP. [Accessed: 13 January 2026]. Available at: https://www.swp-berlin.org/publikation/mauritanias-balancing-act-amid-intensifying-algerian-moroccan-rivalry

Liga, A. (ed.) (2023). The cost of "Non-Maghreb". Unpacking the political and economic costs of disunion and divisions. Milan, ISPI.

Lynch, J. (2025). Aid cuts leave civil society adrift in the midst of a storm [online]. *Afkar/ideas*. No. 76, pp. 28–32. [Accessed: 30 December 2025]. Available at: https://www.iemed.org/publication/los-recortes-en-ayuda-dejan-a-la-sociedad-civil-a-la-deriva-en-plena-tempestad/?lang=es

Meddeb, H. (2025). Economic Statecraft as Geopolitical Strategy: New Dimensions of Moroccan-Algerian Rivalry [online]. Carnegie Endowment for International Peace. [Accessed: 2 January 2026]. Available at: https://dialogueinitiatives.org/economic-statecraft-new-dimensions-of-moroccan-algerian-rivalry/

Mohsen-Finan, K. (2025). In Western Sahara, the "Pax Americana" seals Morocco's victory [online]. *Orient XXI*. [Accessed:

10 January 2026]. Available at: https://orientxxi.info/au-sahara-occidental-la-pax-americana-consacre-la-victoire-du-maroc,8640?brid=r_q1tfgAFCLssOliendckA

Roggero, C. (2025). The Mediterranean Pact: a half-hearted attempt to revive the partnership [online]. *Afkar/ideas*. No. 76, pp. 14–17. [Accessed: 30 December 2025]. Available at: https://www.iemed.org/publication/el-pacto-por-el-mediterraneo-un-intento-a-la-baja-de-reactivar-el-partenariado/?lang=es

Soler, E. (2023). Managing division: the European Union and conflicts. *CIDOB Journal of International Affairs*. No. 135, pp. 193–217. DOI: doi.org/10.24241/rcai.2023.135.3.193

Tani, S. and Saleh, H. (2025). The illicit oil trade that is keeping Libya divided [online]. *Financial Times*. [Accessed: 12 January 2025]. Available at: https://www.ft.com/content/aabcfb72-a606-498d-a35d-c6e667cd19f3

Zoubir, Y. (2025). Will the Maghreb States Have to Choose Between the US and China? [online]. *Afkār*. [Accessed: 12 January 2026]. Available at: https://mecouncil.org/blog_posts/will-the-maghreb-states-have-to-pick-between-the-u-s-and-china/

Chapter Seven

'Latin America at a crossroads'[1]

Guillermo Fernández de Soto, Andrés Rugeles

Abstract

The region finds itself immersed in a complex world characterised by fragility, polarisation and fragmentation, under the geopolitics of uncertainty and strategic competition between the major powers. It is against this backdrop that Latin America must deepen its integration and international engagement as systemic challenges of the utmost importance. This requires decisions that enable the construction of a 'Latin American Way' to foster the best possible relations, simultaneously, with key players such as the United States, China, the European Union (EU) and India, as well as achieving active participation and greater influence in the most relevant multilateral forums and international mechanisms.

[1] This document is based on reflections from the 'Latin America in the World' project, which was developed at the University of Oxford and the London School of Economics (LSE). Building on this initiative, a series of opinion columns in the press and articles in specialist journals have been published, as well as the following three books in a series: Rugeles, A. (2024), *Latin America: the vision of its leaders*; Fernández de Soto, G. and Rugeles, A. (2024), *Latin America in the World: 21 Ideas for Reflection and Action*; and Fernández de Soto, G. and Rugeles, A. (2026), *Colombia Global: A Foreign Policy for Security and Development*

Latin America has every potential to become a region that offers solutions in the 21st-century economy.

Keywords

Latin America, Geopolitics, Integration, International integration, Strategic competition, Multilateralism.

Introduction

Latin America stands at a crossroads not only at the regional and international levels, but also at the national level. How it navigates these challenges will largely determine its prosperity and future in the coming decades.

The global environment is characterised by fragility, polarisation and fragmentation, against a backdrop of strategic competition between the United States and China, followed by revisionist countries such as Iran and Russia. This rivalry could lead the world into a scenario of reduced cooperation and trade and technological war, with consequences yet to be fully understood.

The 'geopolitics of uncertainty' has returned with unprecedented vigour, particularly with the arrival of President Trump's second administration in Washington in January 2025 and his desire to reclaim leadership and power. For its part, Latin America is navigating amidst the reinterpretation and revival of the Monroe Doctrine and hemispheric debates on migration, drug trafficking, trade, and mineral and energy resources.

Within this framework, this document examines the geopolitical challenges of Latin America's integration into the international order. It does so by analysing the global context and associated risks in order to assess the challenges of regional integration and the construction of a Latin American path based on values and principles. This approach will enable us to engage constructively with the main actors in the global order, such as the United States, China, the European Union and India. Its focus is analytical and forward-looking, looking ahead to 2050.

1 Global political risk

The year 2026 could be summed up in three words: readjustment, adaptation and conflict. According to the International Crisis Group, 'the world seems headed for a paradigm shift. The question is whether it will take place at the negotiating table or on the battlefield'.

This paradigm shift represents a turning point in history, which is reflected in emerging political challenges. We have entered a new historical phase that will shape not only foreign relations, but also the ways in which countries are governed, and the ways in which society functions and produces.

According to the latest report from the Eurasia Group, a series of risks are expected to unfold throughout the year, among which the following stand out:

a) The functioning of 21st-century economic technologies is underpinned by electrons, such as electric vehicles, drones, robots, smart grids, battery storage and artificial intelligence. The foundations of this new 21st-century economy will lead to the displacement of nations and relationships of dependency.

b) The adoption by companies of artificial intelligence and extractive business models could threaten the social and political stability of countries.

c) The trap of deflation in China and its policies to promote exports of cheap goods to global markets pose a huge challenge.

d) The threat to Europe arising from Russia's war against Ukraine and its effects on continental security and NATO, as well as the vacuum left by the US withdrawal, are causes for concern.

e) Access to water is a source of deep and dangerous rivalries and conflicts around the world.

It must be emphasised that economic and commercial competition between the major powers has shifted to the fields of technology, biotechnology and AI. This rivalry is expected to intensify and become more acute over time. The country or bloc that achieves a significant advantage in these spheres will assume leadership in the new global geopolitical landscape. This is the scale of this challenge and what is at stake.

For this reason, the United States and its allies have imposed a whole series of restrictions on exports to China and controls on investment, with the aim of limiting the Asian giant's ability to acquire various equipment and software that are critical for the manufacture of semiconductors. For its part, Beijing has responded by imposing restrictions on the export of minerals key to the manufacture of semiconductors and lithium batteries.

Technological protectionism is also present in other countries of the Global South, but with the aim of promoting investment and protecting local producers. In the future, these countries will have to choose whether to align themselves with the US or

Chinese sphere of influence, which would be the closest thing to a 'technological cold war' scenario.

Despite all the restrictions imposed and the embargoes on microprocessor exports, China continues to make progress in its race. It surprised the world with the launch of DeepSeek (a rival to ChatGPT). This Chinese application has become a disruptive force that is ending Silicon Valley's dominance and opening up the market to new players. Among its features are its free use and open-source nature, which contribute to the proliferation of new developers and generate a positive impact on productivity.

2 The challenge of regional integration

Is it possible to envisage ambitious integration within the Latin American sphere at a time of geopolitical tension, when nations and regional blocs are reinforcing their walls against the outside world? The answer is yes: in fact, the region can capitalise on this scenario and may even propose a new paradigm in this regard.

The balance of power is shifting, and levels of turbulence are rising due to rivalries with emerging nations from the Global South. Thus, in academic and political economy circles, there is analysis of a 'new globalisation' or a sort of 'deglobalisation' deepened by the consequences of the acceleration of the Fourth Industrial Revolution.

Indeed, Raghuram G. Rajan, former Governor of the Reserve Bank of India, has highlighted how the ratio of global exports of goods and services to global GDP peaked in 2008 and has been on a downward trend ever since. Furthermore, the world's two largest economies have become increasingly hostile, seeking to reduce their mutual dependence on goods and services. Since the global financial crisis at the start of this century, five times as many protectionist measures as liberalising ones have been enacted worldwide.

At the same time, opportunities are emerging from the restructuring of global supply chains and the shift towards increasingly green economies.

The relocation of operations could generate an additional USD 78 billion a year in exports of goods and services for the region, in sectors such as the automotive, textile, pharmaceutical and renewable energy industries. Mexico and Brazil would be the main beneficiaries (Inter-American Development Bank).

2.1 Multidimensional approach

Latin America faces a huge task in advancing integration and redoubling its efforts, adopting a multidimensional approach and guided by the principles of 'variable geometry' and 'interdependent regionalism'. A highly integrated regional area would help reduce exposure to changes in the trade and industrial policies of its main extra-regional partners.

The value of these instruments was recognised decades ago by Europe and the countries of East Asia. They managed to make decisive progress. Intra-regional trade in Europe accounts for 65% of total trade; in East Asia it stands at around 50%, whilst intra-Latin American trade reaches only 17%. Similarly, unlike our region, Asian countries have managed to develop agile value chains with enormous added value, which are resilient and capable of detecting external risks, in sectors such as consumer goods, healthcare equipment, agricultural technology and electronic manufacturing services, amongst others.

Latin America has failed to consolidate its integration over the decades, which is a source of frustration. Deepening the process must overcome enormous challenges, such as: 1) politicisation and bureaucracy; 2) the fragmentation of the region and the lack of internal cohesion; 3) sensitivities regarding free trade and the ideological baggage of the past; 4) the lack of flexibility in institutional frameworks and convergence between them; 5) the loss of ground in global trade and investment flows, the current reduction in levels of integration, and the deliberate weakening of successful schemes, such as the Pacific Alliance.

2.2 A political imperative and a comprehensive agenda

In response, integration must be conceived not as an option, but as a political imperative. It is an aspiration with strategic significance and a comprehensive agenda. It must remain outside the debates between the left and the right. Likewise, it requires us to unite around a joint international projection on key issues and 'common ground'.

The central pillars of this project include productive transformation, value chains and trade, infrastructure and logistics, human capital development, and quality foreign investment, amongst others.

The region is called upon to redouble its commitment to renewed integration and to reaffirm the value of democracy, cooperation and multilateralism. Only in this way will it have an active and united voice in the main forums and on the key issues of the international agenda, ensuring a relevant role. Latin American citizens want this. Over 70% support integration and international engagement.

In order to promote greater integration in Latin America, the following elements must be taken into account—based on respect for institutions and stable, common rules—for the development of a comprehensive agenda.

a) Productive transformation: there is a need to boost productive transformation, with the aim of incorporating greater added value and technology into products, in accordance with the principles of environmental sustainability and the circular economy. Efforts must be directed towards increasing productivity and competitiveness. The path forward is the transition from a model of comparative advantages to one of competitive advantages, which will help break down the barriers of the 'middle-income trap'.

b) Global production chains and trade: three factors—geographical location, the workforce and respect for intellectual property rights—offer the region a tremendous opportunity to integrate into the global economy.

   Greater specialisation, the development of new sectors and the incorporation of greater value into supply chains are vital so that businesses—particularly small and medium-sized enterprises—can have a multiplier effect on employment and well-being. Furthermore, multi-Latin American companies are essential for competing in the big leagues.

c) Boosting infrastructure and logistics: these constitute one of the main bottlenecks and shortcomings for deeper integration. Public investment in this area in the region stands at just 3.5% compared to 7% in South Asia or 18% in China.

   There is a consensus on the need to double and improve the quality of investment in transport, energy, communications and digitalisation, which must exceed 6% of GDP annually. Southeast Asian countries allocate 7.9% of their GDP to this. This effort must be undertaken jointly by the public and private sectors, with the support of multilateral banks and bilateral institutions, capital markets, funds, and others.

d) Human capital development at all levels: our societies must raise the standard and quality of education. We need to strengthen education systems and adapt human capital to current needs and those of the 21st-century digital revolution.

   We must move beyond the traditional educational framework of universities and technical colleges. This involves implementing innovative schemes for specialisation and continuous training, which would enable us to respond to the profound transformations taking place in production, logistics and distribution processes.

e) Financing: Latin America requires higher levels of savings and investment—as Asian countries have done—and the development of stable, robust systems that are vital for providing financing and diversifying risk.

   Similarly, multilateral institutions are key, not only because of the medium- and long-term resources they can provide to the region on favourable terms, but also because of the catalytic role they play and the knowledge they generate.

   Institutions such as CAF, the IDB and the World Bank are called upon to take on this challenge in a comprehensive and dynamic manner.

The window of opportunity facing the region must not be squandered once again. Therefore, the government, the private sector and civil society are called upon to work closely and in a coordinated manner to rise to the challenges of our time, to think of the common good and to build broad consensus for the development of long-term strategies.

Boldness, pragmatism and vision are needed. The opportunities are there. To refuse to seize them would be a grave mistake and would deny Latin Americans the chance to live better lives through an integration that beckons and is well worth giving a chance to expand.

3 The challenge of forging a Latin American path to integration with the world

In the coming years and decades, the military, economic and development dimensions—which include cross-cutting elements such as technology, the environment and energy—will be shaped by shifts in the new geopolitics and geoeconomics, as well as by the global food, fuel and financial crises; climate change and water issues; and the use of artificial intelligence in various spheres of life.

It is a fact that the centre of power is shifting from the West to Asia: by 2060, this continent will account for more than 55% of global GDP and be home to around 53% of the world's population, with a robust middle class and an advanced process of urbanisation (six of the world's ten largest cities).

The interplay of all these elements is, at least in part, both the cause and effect of a reconfiguration of the international system—in terms of its functioning, its key actors and the power dynamics at play. Former Spanish Foreign Minister Josep Piqué described the process as a realignment of forces at the global level from the perspective of state and non-state actors, as well as rivalry for power or influence over specific territories and their populations. In practice, this means a world whose centre of gravity is less Western, as a result of the strengthening of actors such as China. He termed it a world of 'post-Western synthesis', where there would be coexistence between powers (both declining and emerging) and a convergence of values, ideas and beliefs.

We are faced with different visions regarding how to organise society and construct an order of international relations. G. John Ikenberry, a professor at Princeton University, describes how the rise of new actors brings about new coalitions, institutional arrangements and forms of multilateral cooperation. These dynamics, he adds, could also strengthen regional governance frameworks. In any case, in the absence of better alternatives, the multilateral organisation of the global system remains relevant.

It is into this complex world that Latin America must position itself intelligently. And it must do so whilst growing and working to overcome the traps of poverty and inequality, consolidate a new productive model, tackle climate change and strengthen its democratic institutions in the face of the challenges posed by drug trafficking and transnational organised crime.

The region has a duty to harness its enormous potential. Indeed, one cannot speak of climate change without mentioning Latin America. We are the lungs of the world and part of the solution. The Amazon absorbs a quarter of the planet's CO_2. Our electricity mix is one of the cleanest, with 61% from renewable sources. In terms of minerals, we hold 60% of the world's lithium reserves, 50% of copper and 39% of silver—all critical elements for the energy transition. In food, we are the world's breadbasket, being the largest exporting region. Furthermore, it is the most dynamic region after India in terms of venture capital and unicorns.

The region's integration into the global economy, alongside integration amongst its own countries, is a systemic challenge of the utmost importance—perhaps one of the greatest in our shared history—as the success and long-term sustainability of the progress achieved at the intra-regional level depend on it.

The construction of a Latin American path to international integration ('Latin American Way') constitutes both a challenge and an opportunity to simultaneously foster the best possible relations with key international actors, as well as to participate actively and influentially in the most relevant international forums and mechanisms.

To achieve a comprehensive vision, the guiding principle of *respice omnia* (look at the whole, look at the universe)[2] is particularly relevant. This concept contrasts with *respice polum*, which would imply looking only at a centre of power—a pole—and with *respice similia* (look at one's peers), which would ultimately limit us in the global conversation. Latin America is therefore called upon to be present on every possible international platform. The only viable path lies in cooperation, solidarity and multilateralism.

3.1 How can this be achieved?

There are five elements that must guide the construction of a Latin American foreign policy in a global landscape where strategic autonomy, interdependence and pluralism are increasingly decisive factors.

a) Defence of democratic principles: international politics reflects the interplay of a series of intersecting interests that overlap, complement or feed into one another, but it is also a matter of values—if you will, the work of bringing a worldview to fruition. In this sense, defending democratic principles, institutions and practices must be the spearhead and the foundation of all action.

2 A term coined by Guillermo Fernández de Soto, former Foreign Minister and President of the Colombian Council on International Relations (CORI).

b) Pragmatism: the key to balance lies in pragmatism derived from a multidimensional and multilateral view of the international system—an agenda that prioritises cooperation over confrontation. It is possible to strike a balance in relations with the main global actors without compromising on interests and principles. Likewise, addressing key issues such as the environment, human rights, migration, development, trade and investment, the fight against the global drug problem, and arms trafficking, amongst others.

c) Unity of purpose: for the Latin American path to be possible, unity of purpose is required. The development of common agendas that do not entail the nullification of each country's legitimate aims and interests is a fundamental basis. Achieving adequate representation depends on dialogue and coordination. This, of course, also intersects with the advancement of a paradigm: the Global South.

d) Respect for the norms of international law: just as with the defence of democratic principles, respect for the norms and principles of international law must be an unwavering principle of this process. Adherence to the rules of the game—their protection and strengthening—has characterised Latin American foreign policy, as well as its contributions and influence in favour of the progressive development of international law. It is a central element embedded in the region's DNA and now is not the time to waver on this.

e) Defending and strengthening a renewed multilateralism: this concept is central and must serve as a framework for all actions. The path to addressing present and future challenges—a good starting point for making progress in addressing the growing points of tension on the international stage—lies in a renewed multilateralism. Like a great umbrella, a reinforced multilateralism will have the capacity to encompass the diverse dynamics generated across the four corners of global governance.

4 The region in the face of major global players

In their book *The New Solitude of Latin America*, former President Ricardo Lagos, former Foreign Minister Jorge Castañeda and intellectual Héctor Aguilar Amín issue a clear warning that is becoming increasingly relevant: our region may be entering a new period of isolation.

The possibility of a new solitude for Latin America jeopardises the progress achieved and threatens to marginalise us from a dynamic that, by all accounts, requires active involvement and shared agendas.

We are part of a planet in transition. The current times demand action based on two elements: an understanding of the present and a vision for the future. Understanding the changes in the international order from a realistic and constructive perspective that prioritises collective action is the foundation for introducing lasting institutional arrangements. Global problems require global solutions and institutions.

From this perspective, by overcoming short-term political thinking and polarisation, Latin America can begin to find its place in the world—one that prevents a period of isolation and amplifies its voice, which is vibrant, young and full of potential. The region must build its own path to integration that opens the doors to greater prosperity and well-being. It must establish a constructive and proactive relationship with the main actors in the global order, such as the United States, China, the European Union and India, within the framework of a renewed multilateralism. The key lies in our hands, and in no one else's.

4.1 Latin America, the United States and China: a tense tango between three

The shifting tectonic plates of international politics are leading to the formation of a system of multiple complexities, with varying speeds and scopes across its dimensions: political, military, economic and cross-cutting issues. The renowned professor Amitav Acharya has described this process as a 'multiplex world' As if several films were being screened simultaneously in different cinemas, global governance and order rest in the hands of multiple actors and are determined by cross-cutting factors, such as geographical scope, leadership and the balance of power. Their repercussions at the local level are far-reaching and make clear the broad outlines by which Latin America must navigate its external relations in the future.

It is clear that we are operating within a new context, marked not only by the decline of the Cold War superpowers' hegemony, but also by the need to redefine the course of relations on the continent, based on a comprehensive, constructive agenda that benefits all parties. Some of its key elements are as follows:

4.1.1 Decline of Hegemony

The shift from the West to the Asia-Pacific is leading the world into a new historical era. Washington's hegemonic role is entering the 21st century in a process of change, in which global power is being shared.

Despite its internal political tensions and social inequalities, the United States continues and will continue to play a very important leadership role. It will do so in economic, political, military and intellectual terms.

The central issue is not the 'decline' of America or the focus on 'Make America Great Again', but the emergence of other actors. The bipolarity between the United States and China will set the tone in a world in transition. The terms and scope of soft power, and the credibility and capacity to build networks and exert influence, will come under scrutiny.

4.1.2 China-US strategic competition

This trend has intensified in recent years as Beijing has launched an increasingly open, active and defiant offensive towards Latin America.

China has openly invited countries in the region to join strategic projects aimed at expanding its influence, such as the 'Belt and Road Initiative', the 'Global Development Initiative', the 'Global Security Initiative', the 'Global Civilisation Initiative', and the most recent 'Global Governance Initiative'. The economic and commercial focus has been on securing natural resources and raw materials, opening up new markets, and investing in infrastructure, innovation, technology and telecommunications.

This strategy has enabled it to become South America's leading trading partner and Latin America's second-largest partner—after the United States—to flood local markets with consumer and intermediate goods, and to exert significant influence over foreign direct investment in strategic sectors, such as the electricity sector. The figures speak for themselves: total bilateral trade exceeded USD 450 billion in 2025.

For its part, the United States has maintained a relationship with China in which tensions have escalated due to the COVID-19 pandemic and the rise of President Xi Jinping and his more ambitious vision centred on illiberal democracy, greater control and repression, and state capitalism. Competition and rivalry will be the order of the day, as will decoupling. For some analysts, such as Wang Huiyao, president of the Centre for China and Globalisation in Beijing, this process has become irreversible and may lead to the 'system splitting into two parts'.

President Trump's administration has shown an interest in regaining lost ground in Latin America. To this end, it has forged new alliances and found partners such as Argentina, El Salvador, Ecuador and Paraguay. The United States has remained the region's leading trading partner and has consolidated its position as the largest investor, accounting for 38% of the value invested in 2024.

4.1.3 New dynamics in hemispheric relations

In late 2025, the United States launched its new National Security Strategy, marking a turning point of enormous magnitude by challenging the assumptions that have shaped US foreign policy since the end of the Cold War. This document offers a systematic critique of liberal internationalism and the idea of benevolent hegemony and redefines its national interests. In particular, it considers that borders and institutions protect not only territory but also cultural identity and sovereignty; it commits to reindustrialisation and the strategic use of tariffs and regards the presence of extra-regional actors as a direct threat to its security.

According to experts, the actions taken in Venezuela during the military operation to remove the narco-dictator Nicolás Maduro on 3 January 2026 constitute the first visible, concrete and unmediated application of the new hemispheric security doctrine. 'Washington has set aside the gradualist approach to sanctions, multilateral rhetoric and mechanisms of indirect pressure to act under a logic of transnational threat, where drug trafficking, state collapse and extra-regional alignments combine to justify the direct use of force'.[3]

Washington has prioritised the areas of migration, drugs and security, trade and energy resources. To this equation must be added elements central to the region, such as the defence of democracy, the energy transition, nearshoring and digital

[3] See: https://www.infobae.com/america/opinion/2026/01/05/la-nueva-doctrina-trump-y-el-retorno-de-la-seguridad-hemisferica-venezuela-como-anticipo-del-orden-que-viene/

transformation, amongst others. This is an exercise in projecting national interests, which must set aside differences and take into account the heterogeneity, priorities and enormous political complexity of Latin America.

For the region, the worst-case scenario would be to be confined to a fragmented inter-American agenda that only serves the interests of a few and revolves around sanctions, walls and tariffs.

4.1.4 A comprehensive and pragmatic agenda

Latin America therefore needs to make a greater effort to strengthen dialogue, cooperation and joint work, under a comprehensive and pragmatic agenda involving both the public and private sectors. It is an exercise in reinvention that takes into account the diversity, priorities and enormous political complexity of Latin America.

The aim is to build a working agenda that moves beyond traditional issues and obsessions with problems and offers alternatives. It must also be accompanied by new tools that promote cooperation over confrontation.

The future of hemispheric dialogue should focus on at least five priority areas: 1) public safety, organised crime and irregular migration; 2) food security, resilient agricultural systems and inclusive supply chains; 3) energy security, diversification of sources and reliable access for countries in the region; 4) water security, highlighting the importance of water as an essential resource for sustainable development; 5) trade and strategic investment, productive linkages and an innovative business sector.

Democracy, as a cornerstone of our relationship, warrants special attention and focus given the progressive deterioration of certain regimes in the region and their populist and authoritarian tendencies.

In short, the region faces the strategic challenge of balancing its relationship with the United States and China. These should not be mutually exclusive options. On the contrary, they are valid and compatible alternatives that can coexist and contribute—each drawing on its own strengths and virtues—to the common good.

We are facing a tense tango for three: the US, Latin America and China. This is a dance which, since its origins in the late 19th century in the Río de la Plata, has been a response and a living expression of the search for identity and freedom. It has–just as in international politics–various steps and movements, actors and instruments, hopes and even passions.

4.2 Latin America and the European Union

The relationship between Latin America and the European Union is facing a series of challenges due to various factors that interact at different times and speeds, creating pressure to reshape the bi-regional relationship. This is not merely an option, but a necessity.

Current global projections for the middle of this century do not bode well for either region, or the threat of irrelevance looms large.

The European Union now faces the challenge of redefining its leadership role in a changing international context. This decade will be decisive for its project and the reconstruction of its geopolitical role, in an endeavour that combines military capabilities and soft power.

The so-called 'four simultaneous wars' (Russia's invasion of Ukraine, the US tariff offensive, tensions with China and the situation in Gaza) are affecting the European Union, reinforcing the imperative to redefine transatlantic relations, new partners and cooperation, strategic autonomy, external security policy and sovereignty, energy security and technological competitiveness.

In the words of Enrico Letta, former Prime Minister of Italy, the European project must choose between unity or irrelevance.

> 'Now is the time to act. Now we have the "last chance". Because never before has inertia meant decline. And inertia will simply lead us to ask ourselves, as individual European countries, whether we want to be a US or Chinese colony. We are and will remain European; Spanish and European, Italian and European. We will never be a US or Chinese colony'.

This approach requires leadership from its members, as well as collective action to defend its community project, protect its borders, preserve democracy and a rules-based order. Europe must take responsibility for its own security and defence, through NATO, and strengthen its relations with other extra-regional partners.

In this scenario, Latin America emerges as a natural and strategic partner for the European Union, both in the defence of transatlantic values — which are key to making common cause for a more balanced and less polarised world — and in the promotion of trade, investment, the triple transition (green, digital and energy, with an emphasis on human development) and international cooperation.

Together, the two regions comprise sixty countries; one billion inhabitants; twenty-five million square kilometres; 25% of global GDP; bilateral trade worth USD 406 billion a year; and bi-regional investments totalling some USD 1.05 quintillion. Added to this are trade agreements in force with 27 of the 33 countries in Latin America and the Caribbean, and a third of the members of the United Nations.

These demands going beyond a mere meeting of leaders from both regions. It requires the implementation of a series of tasks that affirm the value of variable geometry in bi-regional instruments; a thorough understanding of the political heterogeneity and complexity of our countries; support for greater convergence between the different integration schemes; and meticulous—almost clockwork-like—analysis of the forces and windows of opportunity that open and close in a new international landscape.

4.2.1 A shared agenda for the 21st century

The current global situation requires the EU to constantly engage in foresight and reinvention in order to achieve its objective of strategic autonomy, through an internal and external political agenda in priority areas of action.

In this regard, it should be noted that, according to the Commission's strategic foresight reports, Europe is focusing its efforts over the coming years on the following areas of action with the aim of: 1) ensuring sustainable and resilient food security systems; 2) reducing its energy dependence; 3) ensure a sufficient supply of decarbonised and affordable energy as central elements for building greener and more digital economies; 4) secure and diversify the supply of critical raw materials; 5) develop research and trade partnerships to ensure a sustainable and diverse supply; 6) develop and retain skills and talent that align with the EU's ambitions; 7) work with global partners to promote peace, security and prosperity for all; amongst others.

In each of these areas, Latin America has an important role to play and assets to contribute. In other words, the region possesses precisely what the EU needs to tackle its main challenges. These elements, together with connectivity and digitalisation, infrastructure, skilled human resources, democracy and human rights, and the strength of multilateralism, form the cornerstone of this new dimension of bi-regional relations.

This approach contributes not only to strengthening dialogue around a region-to-region relationship, but also to building a positive and ambitious roadmap focused on the following pillars:

a) A modern and robust strategic partnership.
b) Promoting trade and investment through the "Global Gateway" initiative for a just ecological and digital transition.
c) Promotion of more sustainable, fair and interconnected societies.
d) Joint action in support of justice, public safety and the fight against transnational organised crime.
e) Promotion of peace and security, democracy, the rule of law, human rights and humanitarian aid.
f) Creating a dynamic people-to-people partnership that puts people at the centre.

As a natural partner of Latin America and the Caribbean, Spain is called upon to play a leading role in the full implementation of this agenda, the modernisation of agreements that boost trade and investment flows to the region, the strengthening of development cooperation, the mobilisation of the business sector, and the promotion of global supply chains.

4.2.2 In the search for 'specific actions'

Both regions require a qualitative and quantitative leap in their multi-level relationship. They must undertake a realistic and pragmatic exercise that enables a shift from political declarations to concrete actions, centred on initiatives and projects that breathe life and momentum into the strategic partnership. New areas of interest, such as security and migration, must be included and prioritised.

The two regions must step up their efforts in support of the triple transition—green, digital and energy—with an emphasis on human development, through concrete actions, measurable impacts and tangible benefits for the populations of both continents. In particular, there is a need to boost and rebalance global strategic value chains.

Below are some lines of work and cooperation which, from a Latin American perspective, are more than necessary and which coincide with the European approach of 'shared values' and 'public policy first':

a) The *promotion and defence of democracy* requires joint programmes, statements and firm stances against the region's authoritarian regimes—whether left-wing or right-wing—which have a track record of violating human rights and fundamental freedoms.

b) Latin America and Europe must redouble their efforts in the *fight against irregular migration and transnational organised crime* (the global drug problem, illicit trafficking in small arms and light weapons, money laundering, cybersecurity, amongst others), based on the development of comprehensive, coordinated approaches under the principle of shared responsibility. Drug cartels must be designated as narco-terrorist organisations.

c) Building on the Global Gateway and the pledge to mobilise €45 billion by 2027, it is essential *to advance infrastructure projects and promote growth, employment, social cohesion and human development, particularly for young people and women.* This initiative, together with the Digital Alliance, presents an opportunity to improve the region's productivity and competitiveness, as well as to offer an alternative to the 'Silk Road' promoted by China.

d) Progress must be made towards the ratification and entry into force of the *Mercosur–EU Agreement*, beyond its signing in January 2026 in Paraguay. Internal differences in some European countries, pressure from productive sectors and conflicting views on environmental matters slowed down the negotiations, which took twenty-six years. This agreement creates the world's largest free trade area, with over 720 million potential customers. According to EU estimates, exports from the EU to Mercosur are expected to increase by 39%, whilst exports from Mercosur to the EU are expected to grow by 17%. The bi-regional relationship must move into a phase of action that takes into account the new geopolitical landscape and criteria such as strategic-shoring and energy-shoring.

e) Strategic bi-regional projects *should be promoted to foster cohesion and positive synergies* in areas such as sustainable cities, biodiversity protection and debt-for-climate swaps, digital skills, new technologies and AI, and higher education, amongst others.

f) *Reform of the international financial architecture* is an area where the two regions have the potential to collaborate and contribute to the design of mechanisms for the provision of resources in times of crisis, devise innovative debt restructuring mechanisms linked to environmental protection, strengthen regional multilateral banking, and forge a New Global Financing Pact.

The success of this agenda will depend on the political will, pragmatism and maturity of leaders on both sides of the Atlantic, and on the European Union's ability to take on the challenge of global leadership—for the sake of its autonomy and security—and to serve as a complementary alternative to the United States and China.

Latin America does not seek paternalism from Europe, nor does it want subsidies, magic formulas or impositions from the Old Continent to solve its structural problems. What it does seek, however, is a relationship and a partnership of equals to build a shared and prosperous path forward.

4.3 Latin America and India

The gradual and irreversible shift of economic power towards Asia is not a new phenomenon. One need only recall how, between the years 1000 and 1800, China and India emerged as the world's major economies.

New Delhi is emerging as one of the winners. It is doing so not only in the economic sphere by becoming one of the engines of growth alongside Beijing, but also by becoming the world's most populous country with 1.45 billion inhabitants and achieving notable international leadership and prominence through strategic initiatives such as the G-20 and the BRICS+.

4.3.1 A driving force for growth

Global economic projections for 2026 indicate growth of just 3.1% (IMF), affected mainly by potential tariff increases, greater uncertainty and geopolitical tensions. According to this financial institution, one of the main tasks will be to restore confidence, predictability and sustainability.

India will grow by over 6.4% this year, one of the highest rates among the 46 countries in the Asia-Pacific region. It has been the world's fifth-largest economy since 2022 and is expected to become the third-largest economy very soon—before 2030—surpassing Japan and Germany.

It has managed to capitalise on the reorganisation of global production and supply chains. It has become a manufacturing and technological powerhouse. Comparatively, its workforce is highly educated and costs are low.

India's development is the result of the strategic direction the country has taken, the building of solid macroeconomic foundations, and a series of structural reforms adopted to simplify regulatory frameworks, eliminate unnecessary red tape, and provide greater certainty and transparency. It has focused on key areas such as investment, infrastructure, digitalisation, urbanisation, rural development and foreign trade, amongst others. A clear example is its ambitious commitment to tripling exports. Its target is to reach two quintillion dollars by 2030.

4.3.2 International leadership and prominence

India has embarked on a new narrative as an emerging power that seeks and deserves its own place in the world. Its foreign policy is characterised by pragmatism and a multipolar vision. The best way to define it is through the concept of 'strategic autonomy', which offers a third way for those nations of the Global South that do not wish to align themselves with the major global powers or become embroiled in the East-West bipolar struggle. Its intention is to act as a hinge between rival powers, and its objective is to achieve a mixed alignment through multidimensional platforms.

The country has been critical of China and Pakistan—two major rivals with whom it still has differences to resolve—on issues of borders, sovereignty and territorial integrity. It has even gone further by joining the strategic Indo-Pacific coalition known as the 'Quad', comprising Australia, Japan and the United States, and has additionally forged close strategic ties of cooperation with Europe.

Its intentions are clear. It seeks to act as a counterweight to China in the region. Analysts such as Tanvi Madan of the Brookings Institution describe it as a relationship that has shifted from 'competitive engagement' towards 'competitive coexistence', not to say 'armed coexistence'.

Through the G20, it has sought to voice the discontent of developing nations, as well as their concerns on key issues such as food security, energy prices, the effects of global warming and geopolitical tensions. It also plays a significant role in the BRICS+ and the Shanghai Cooperation Organisation (SCO), as well as in the United Nations.

4.3.3 Relations with Latin America

The region—despite the geographical distance—faces the challenge of drawing closer to India in a strategic effort to build and defend the Global South, in order to promote political dialogue, trade, investment and horizontal cooperation. Brazil, Mexico, Colombia, Argentina and Peru are some of its main partners, but the scope should be broadened to include other nations in the region as well as other sectors.

The volume of bi-regional trade exceeds USD 40 billion a year, but it still falls short of its potential despite the complementarity of the economies and the growth seen over the last decade (145%). It is concentrated in a few countries and products, mainly primary or natural resource-based goods (exports) and value-added products with medium-to-high technology (imports). This could rise to one hundred billion dollars in the coming years, according to estimates by R. Viswanathan, former head of the Latin America department at the Indian Ministry of External Affairs.

In terms of Foreign Direct Investment (FDI), there is considerable room for improvement. The figures are modest. From 2001 to 2022, the region received only 6.7% of India's total foreign direct investment. That is, USD 1.8 billion out of a total of USD 27.8 billion (Indian Ministry of Finance).

Studies by CAF—Development Bank of Latin America and the Caribbean—point towards the construction of a multidimensional integration platform in Indo-Latin American relations to scale up, diversify and enhance trade and investment, as well as to promote food security and the climate agenda, energy security, new technologies and health, amongst other areas.

To achieve this, reforms must be implemented to ensure strategic convergence and growth in both quantity and quality. According to studies by the Inter-American Development Bank (IDB), this will require expanding the scope of trade and investment agreements, creating mechanisms to facilitate trade, carrying out promotional activities, improving logistics, boosting investment in infrastructure and critical sectors, deepening technical cooperation and developing business networks.

Ultimately, a more fruitful bi-regional partnership is needed to become a major hub for development.

5 Final remarks

Latin America faces the imperative of building broad internal consensus and moving forward in the face of the immense challenges of global geopolitics.

It possesses all the potential to become a region that offers solutions to the challenges of a global, green and digital economy. It has a role to play and capital to contribute in terms of human resources, the environment, raw materials, climate change, clean energy and food.

In a world where its players are progressively retreating into their own shells with protectionist and unilateral measures, in an exercise of deglobalisation, the great challenge for Latin American countries is to find their own path to international integration that allows the region, as a whole, to achieve an increasingly active voice and presence.

The crossroads of our time demands unity and integration, under the strict adherence to and defence of democracy, development and social justice as a virtuous and indissoluble triad.

Chapter Eight

Populism as a polemological factor

Federico Aznar Fernández-Montesinos

Abstract

Democracies incorporate an oligarchic component that stems from their imperfect nature. And populism is a political strategy that seeks to address these shortcomings and restore power to the people.

The point is that, in the long term, it undermines a country's legal and political framework by eroding its checks and balances (such as the media or the judiciary in their role of protecting fundamental rights or minorities) and its procedures. Furthermore, it is also effective in seizing power, meaning that, rather than an end in itself, it becomes a tool, a strategic model. And democracy requires a loyalty to which populism is not committed.

The communication strategy is key. Not surprisingly, it aims to dominate the news agenda and turn it into the social agenda. And to do so, it makes use of disinformation.

We are faced with a polemological factor due to the crisis of the model it advocates at the national level, but also because of the uncertainty that national populism introduces onto the international stage and the emulation it provokes. The spread of the model it advocates hinders global agreements and strains regional organisations. Added to this is the fact that it undermines multilateralism and challenges the entire Western-inspired rules-based world order established since 1945.

Furthermore, the West is being weakened by what appears to be an internal clash between liberal and illiberal regimes.

Keywords

Trump, Disinformation, Narratives, Communication, Postmodernity.

> 'The best argument against democracy is a five-minute conversation with the average voter.'
>
> A quote attributed to Sir Winston Churchill

1 Democracy and postmodern society

The political function of democracy goes beyond its symbolic nature or magical significance. It consists of creating a resilient framework that fosters the convergence of very opposing forces. Loyalty is a key concept for the functioning of the system. This is underpinned by the internalisation of its values, principles and procedures.

We are dealing with a system of checks and balances—but also with an attitude—that maintains equilibrium and is embodied in institutions. Key elements are the judiciary and the media, which act as countervailing powers. The judiciary ensures the proper balance between the different parts of the system and its impact on the public. And the media are a structural counterbalancing mechanism that enables relatively independent scrutiny. Their plurality and diversity serve the quality of democracy.

Liberal democracies have the capacity to reform themselves through peaceful means, whereas other political regimes rarely evolve and change without conflict.

Nevertheless, representative democracy suffers from a deficit of legitimacy, as the interests of the people are represented without them being consulted directly. Moreover, the system's flaws mean it even has an oligarchic element, given the difficulty of achieving real equality. Thus, Alain de Benoist argued that 'the political and media elites espouse the same discourse'. But this fallibility does not imply that only direct democracy is legitimate, as it too incorporates its own problems that also render it fallible.

Postmodernity, regarded as the current age of the West—and which forms the social framework of democracy—is a state of mind, an attitude of denial and even rejection of all previous thought. The suffix 'post-' implies its overcoming.

The twilight of ideologies—which marked the dawn of the new century—brought a new anthropocentrism from which, in turn, the questioning, softening and reformulation of many prevailing ideas were derived. This is what Gianni Vattimo calls 'weak thought'.

The lack of ideologies implies the absence of vantage points from which to look to the future. There is no future because there is no proposal for one. This concentrates any solution on the present. Compromise then loses its value, for every moment is a new starting point, and one does not look back either to a past that neither exists nor commits.

This lack of horizons gives rise to a sense of drifting. The ephemeral becomes the norm. We are in an age of confusion and weak concepts which, inevitably, rejects any form of sacralisation. It is Baudrillard's 'light society' or Bauman's 'liquid society'.

It is also the realm of the 'light' man, the compliant citizen, without fixed values or thoughts, who lives in a reality tailored to his own measure. That is why 21st-century society is conformist and uncritical. The citizen, in the end, declares himself content with everything as long as his status and standard of living are guaranteed.

2 Populism as a concept between demagoguery and political representation

The word populism appeared in the second half of the 19th century as a direct translation of the term *Narodnichestvo*, which designated a heterogeneous set of political movements on the Russian socialist left. But, as is often the case, the term expresses a much earlier reality. In the words of Ernesto Laclau, "populism is merely a way of constructing the political".

This term, which fits perfectly within postmodernity, has evolved to take on pejorative connotations, even within the spectrum of meanings offered by a highly polysemous word of great conceptual ambiguity. In fact, it has become a label used to discredit any political opponent (Ahedo, 2023).

From this perspective, it is an expression of degeneration, a corruption of the Rousseauian general will, even though it is presented as its realisation. We are faced with a substantially anti-liberal or illiberal proposition.

But the fact is that populism possesses a remarkable cross-cutting nature or versatility. In fact, it is essentially a rhetorical concept, a methodology or strategy, rather than an ideology. For this reason, as Vallespín highlights and Areilza emphasises, it is easier to use it as an adjective than to define it as a noun.

All in all, it is particularly suited to extreme positions given the great communicative power they possess due to their apparent consistency; this causes nuances to lose relevance. Its application is thus a catch-all. But the populist strategy inevitably draws those who employ it towards the extremes as a result of a need for consistency.

Nevertheless, it is also worth noting how David Cameron's British Conservative Party, to serve his personal political agenda, first called a referendum on Scotland's continued membership of the United Kingdom and then promoted Brexit; the result of this contradiction in agendas was a tension that benefited another openly populist and extreme party. And President Donald Trump belongs to a traditional party such as the Republican Party, which may also suffer as a result. Indeed, some authors suggest that it has already mutated into a national-populist movement.

All in all, the left-right axis, the cornerstone of politics since the 19th century, seems to have run its course; for, with the crisis of the welfare state, the consensus surrounding the social and democratic rule of law is beginning to falter, and the social contract that has governed Europe over the last few decades may even be broken.

In any case, the plebiscitary nature of populism involves an appeal to the people, which leads it to be regarded as an expression of direct democracy, a guise behind which it hides. Indeed, by offering simple solutions to difficult and complex problems, it manages to politicise any social unrest.

Populism considers that political representation—and, therefore, liberal democracy— alienates power from the people, as institutions that act against the majority effectively serve to block the decisions of the majority. For populism, there is only one collective subject with a will and, following this logic, the institutions of liberal democracy (constitutions, rights, parliaments, the media or an independent judiciary) are positive if they are subordinate to 'popular power'; but negative when they limit its sovereignty (Gratius and Rivero, 2018).

Power thus acts without restraint. Populism, shielded by this legitimisation, recognises no limitations whatsoever—organisational, procedural or of any other kind, including ideological or epistemological. It presents itself as the only valid and indeed possible ideology. For this reason, it is not only illiberal, but also anti-pluralist, anti-élite and anti-expertise (Gratius and Rivero, 2018).

It seeks refuge in the socio-economic circumstances of the moment. These are channelled into enemies, which is what potential political rivals become rivals whom it no longer even attempts to convince. It confronts prefabricated existential enemies.

It is characterised by its ability to mobilise and connect emotionally with the masses, appealing to their prejudices and aspirations. To achieve this, it simplifies the public sphere and seeks to concentrate power in the executive, often at the expense of freedoms, which can lead to the erosion of the rule of law and of institutions of control (Rivera and González, 2024). There is only the leader and the people.

This represents a psychological and intellectual regression, as it implies the primacy of the emotional over the rational. The populist leader stokes the passions of the people, their most immediate ambitions. And he satisfies them, mind you, whilst neglecting their real interests. And he does so outside due process, using a dichotomous, black-and-white methodology.

For Laclau and Mouffe, hegemony is the capacity of a social group to articulate the elements of a society and provide them with a common direction of progress. They assert that hegemonic capacity is contingent in nature and depends both on socio-historical conditions and on the strategies adopted. Consequently, there are axes other than the economic one through which hegemony can be organised. These can be utilised, even successively, to drive progress (La Trivial, 2024).

And that is precisely what President Trump has done. He has managed to bring together various disparate social groups, whose demands he has successively brought into alignment. These range from technocrats to labour groups, including expatriate communities of different nationalities, alongside the traditional WASP Republican voter. All these groups are united by national populism and the pursuit of economic gain. But naturally, they often put forward demands that are at odds with one another.

In this way, by bringing these groups together, he manages to appeal to the people, but at the same time, he can lead them to act against their own interests, that is, against their deep-seated and genuine interests. And, as a result, the institutions that serve as a counterweight to power are left in a precarious position, their credibility damaged by the betrayal of democratic principles and a failure to uphold due loyalty. That is why populists are branded as 'anti-system'.

For the two post-Marxist authors[1] cited, the main features of populism are: the articulation of antagonism within the community and the challenge to the order as a whole. This challenge is framed in terms of the people versus the elite, although other forms may be adopted.

The populist strategy involves putting the system under extreme strain. To this end, it resorts to oversimplifying reality, social division, demagoguery and authoritarianism. And the key to it all is communication (La Trivial, 2024).

The populist knows how to manage resentment but does not know how to capitalise on their eventual victory because they are unable to deal with the complexity of the 21st century and, above all, do not really have an alternative proposal. They claim to represent the people. Their representation is of what they deem or interpret as the people's most intimate and even hidden desires which, once made explicit, come to shape their political agenda. This becomes a media agenda, a direct line of communication between leader and people.

Populism thus brings the populist leader into the picture, serving to construct him by endowing him with a salvific mission. And he, in turn, practises populism; that is, he politicises the existing discontent by capitalising on it through a self-serving approach to the socio-political situation. He uses it as a source of authority and with the aim of legitimising his authoritarianism.

Unlike other political parties, populists are not bound by ideologies, as their primary objective is first to come to power and then to remain in it; for this reason, it is not strictly a political movement but rather a political logic. The populist leader[2] is a central figure in this scheme. Without populist leaders, populist movements are ineffective and are relegated to the margins of the system (Torre, 2022).

However, it is also true that, by labelling a certain course of action as populist, one is delegitimising a political proposal. And,

[1] Unlike Marx, who had replaced Hegelian reason with class struggle as the driving force of history, Laclau and Mouffe, however, consider that the very idea that history is determined must be overcome, given that capitalism is a failed structure, which broadens their scope for political action.

[2] To address the proliferation of populist leaders, Gideon Rachman's work, *The Age of Authoritarian Leaders* (Spanish edition published by Crítica, translated by Efrén del Valle), may prove interesting. One of the defining features of our time is the spread of the 'strongman' archetype in both democracies and autocracies.

in doing so, one may be ignoring the real concerns of the people. This is all the more so if these concerns diverge from the dominant thinking or that championed by the elites.

Consequently, for authors such as Laclau, populism is a logic that produces popular identities and is absolutely necessary to put an end to exclusionary administrative systems and build alternative orders. The populist rupture is, viewed in this way, precisely the alternative to post-politics, to the administration's negation of the political (Torre, 2022), that is, to the replacement of politics by administrative management.

3 Post-politics, populism and communication

With the end of the Cold War, representative democracy entered a crisis. This is, in part, the result of a process of consensus-building that has narrowed the scope of the political arena by relegating matters of consensus to the technical sphere. It is linked to the twilight of ideologies.

Seen in this light, populism is not a cause of this crisis of legitimacy but its consequence. Democracy, paradoxically, is thus transformed into an event of dissent. This is because it does not oppose a specific resolution, but rather the technical regime that facilitates its adoption, given that this regime has removed itself from politics through its administrative trivialisation (Torre, 2022).

It is this depoliticisation of politics that Žižek, in 1999, termed 'post-politics'. Through this, politics has left behind the old ideological struggles to conceal what has become a technical regime of administration. Through such a strategy, the public's attention is diverted away from structural issues—which, particularly in the case of the economy, have become technicised—and replaced by identity- and culture-based concerns.

The natural result is also a depoliticised society, insofar as it is concerned solely with the recognition of identities (gender, ecology, ethnicity, cultural minorities, sexuality…) and with tolerance of difference. Without downplaying these issues—in which he acknowledges that progress has been made—Žižek's proposal, as a true neo-Marxist, is based on repoliticising the economy, that is, refocusing debates on it.

For his part, Christian Salmon, in 2007, referred to post-politics as the politics of post-truth. This seeks to create or shape public opinion by acting more on emotions and personal beliefs than on objective facts. To this end, it primarily utilises the sentiments that Moïsi identified in relation to trust: fear (lack of trust), hope (the expression of trust) and humiliation (wounded trust), and uses these to structure the discourse. It manipulates them for non-explicit purposes.

Disinformation thus becomes the lifeblood of this depoliticised conception of politics. It makes use of social media, of a population with access to information but with limited time for its analysis and lacking the necessary training.

And its origins have also changed. Thus, the term ‘agitprop’, agitation and propaganda, was a political strategy of the Russian Revolution. It emerged as a movement created by artists to influence public opinion in two ways: passively, on people’s consciences through propaganda, and actively, through agitation (Lenoir-Grand, 2017).

Whereas thinkers such as Chomsky or Derrida were traditionally defined as ‘alternative’, now the ‘alternative’ is, precisely, in power. And that is novel. Power now, from this conception of politics, engages in ‘agitprop’ and is also ‘alternative’.

4 Media and social media in the information age

The media are key to democracy. But they have a dual nature—as both business and public service—and simultaneously disseminate facts and ideas for informational, advertising, propagandistic and even entertainment purposes, which fosters confusion between them (Manrique, 2016).

Furthermore, large groups and corporations have emerged, often linked to state interests and possessing considerable influence, which exploit the absence of effective borders to spread disinformation. This poses a risk of interference in the internal affairs of third parties and a threat to their sovereignty.

Indeed, there has been a significant concentration of companies, such that the vast virtual space has been fenced off and divided up by an oligopoly of digital firms (Merchan, 2017).

Furthermore, the pattern of communication has been radically transformed. Social media are the linchpin of the 21st-century ‘information ecosystem’. These are spaces where users encounter a relative homogeneity and, as a result, ideas and beliefs are treated as equal regardless of their origin and quality.

Social media also enables, under these conditions, shared spaces for interaction between physically dispersed groups, to the extent that the Internet becomes a space for public gathering—an 'online crowd'—facilitating a form of 'e-democracy'.

This is because in 2016, 62% of US adults accessed news via social media and 44% via Facebook (Gottfried and Shearer, 2016). In 2024, Facebook [Meta] had 3.065 billion users, YouTube 2.491 billion, Instagram 2 billion and Twitter 619 million, with an average daily usage of two hours and twenty-three minutes. There are, thus, influencers capable of mobilising or influencing hundreds of millions of people with their opinions.

21st-century society is an information society, given that information is an essential resource. It is estimated that by 2003, humanity had produced 5 exabytes of information, a figure that, by 2011, was being generated every two days. In 2007, the figure rose to 295 exabytes, reaching 600 exabytes by 2011 (Marina, 2017). In 2020, 2.5 quintillion bytes were generated every day. Since then, all human knowledge has doubled every two years, so that today, 90% of it is less than two years old (Gilli, 2019).

This represents a powerful weapon for populism, as it comprises a set of interconnected communication tools and practices that fit perfectly with its rhetoric. Populism and social media feed off one another. Social media facilitates the emergence of populist movements, and these movements have helped turn social media into a space for political mobilisation (Gerbaudo, 2023). They serve to disseminate negative and simplistic messages that are useful from a political communication perspective and that foster polarisation. This is aided by the very structure of social media and the underlying business model.

5 Truth and the struggle for control of the news agenda

In postmodernity, the emotional takes precedence over the rational. Truth is not confined to facts, but also to the feelings it arouses or the allegiances it provokes.

And when power is not measured by wealth or the exchange of goods, in fact, it is neither given nor exchanged, but rather exercised; it exists only in action and is a 'producer' of knowledge and truth (García and Vidarte, 2009: 199). As Michael Foucault put it, 'we are subjected to the production of truth by power, and we cannot exercise power except through the production of truth'

(Foucault, 1979: 140). In other words, whoever holds power holds the truth, and this is no minor matter, for the reverse is also true: whoever holds the truth holds power.

Populism seeks to take control of the political agenda. This involves taking control of the news agenda, insofar as this is an expression of social reality, of the truth. By taking control of it, it also seizes power. And borders are no obstacle to such a strategy.

Added to this is the fact that the news coverage offered by the media focuses on events that represent a certain rupture, and populist, emotive and disruptive messages are precisely that. Such a role is characteristic of the tabloid media. In fact, the format of media spectacles or infotainment (including video games) lends itself very well to the polarising ideas it promotes, thereby creating a sort of symbiosis as both sides benefit (Prior, 2021).

Populism strives to push its debates onto the news agenda. It does so by appealing to emotion. And this is particularly true in postmodern societies, which crave drama and powerful emotions such as fear, anger and hostility. These are typically achieved by simplifying and presenting reality in black and white terms in order to mobilise public opinion. And by repeating the message, because high politics is a form of education. Populist politics thus fractures society, grinding it down in order to subjugate it.

This is psychopolitics. A political construct systematically built upon its irrational component, that is, through the exaggeration of the emotional factor. The people do not so much want to think as to confirm what they already think. Something that may stem from internal or external opinions.

6 Disinformation and populism

Although the dissemination of knowledge is greater in the 21st century, the average quality of information is lower. Everything—the truth and what is not—is found online; it is public. And this is when facts and reality count for less in shaping public opinion than appeals to emotions and beliefs. Furthermore, public opinion is changeable.

Representative democracy seeks to correct such flaws. The key lies in the selection and prioritisation of available information, and the proper formulation of the news agenda.

The resurgence of populism globally has coincided with the proliferation of disinformation. Populism, disinformation and polarisation are intrinsically linked and feed into one another. Indeed, disinformation thrives in environments where there is high emotional polarisation (Rivera and González, 2024).

As a political phenomenon, it is characterised by its ability to connect emotionally with and mobilise the masses. It simplifies politics by dividing society into two opposing camps. The Manichean logic of populism, combined with disinformation, serves to underpin a polarising and divisive narrative. This undermines trust in democratic institutions and political actors (Rivera and González, 2024).

In short, disinformation is anything that hinders the correct use of available information. And this is not directly related to lying. In a century where the truth can be constructed from any fragment of reality and then completely detached from it, lying becomes almost childish, merely the result of a lack of imagination or incompetence.

Disinformation undermines the very foundations of democracy by eroding its basis, as democracy rests on the supposedly free and unconditional decisions of citizens.

Fake news or post-truth narratives offer some kind of benefit, given that their fabrication is economically costly. To combat them, it is imperative to understand their motives and identify the source that has fuelled them. As Derrida once noted: 'What is relevant in a lie is never its content, but the liar's purpose'.

Fake news and hoaxes have always existed throughout human history. There is nothing new about that. The real news is, in fact, the ease and depth with which they now penetrate society through information technologies, and the mass or strategic nature of this phenomenon. The mistrust they provoke serves to deconstruct societies.

All this is nothing new. The novelty lies in the technical apparatus with which it has been equipped. Furthermore, the lack of any filtering on social media means that the user is the sole judge of the veracity of the news.

And this is despite the fact that quite a few of these news items are genuine products of social engineering. The key is to focus or defocus the debate. And it is humans, not bots, who are primarily responsible for the virality of fake news. And this shouldn't come as a surprise, as that is precisely what they were designed to do (Vosoughi, Roy and Aral, 2018).

It seeks to exploit periods of social tension to achieve this. One such period is, without doubt, elections. These create the illusion of a polarisation that does not exist, from which a breakdown in society is inferred. Such a moment allows for an effective strike at the very fabric of the relationship between society and its institutions, when their vulnerability is at its greatest.

It is not so much a question of supporting this or that candidate deemed most favourable, though that too; but, above all, of questioning the framework, of sowing doubt within the community, of highlighting the contradictions and shortcomings of the system, thereby weakening it. The aim is to undermine society's sense of security and, with it, trust—the cornerstone, as we have seen, of Moïsi's emotional strategy.

Disinformation also serves to neutralise the media's role as the fourth estate, thereby undermining the balances of democracy. This is a key element of many populist strategies designed to pave the way for a direct relationship between the leader and the people, whilst eliminating or limiting any mechanism of opposition to their proposals. And these are no minor issues, given that their regulation affects the very foundations of the West.

But the fact is that, historically, the media on the international stage have been used for precisely that purpose: to interfere. As an example, consider the suspension of such prominent news outlets as *Russia Today* and *Sputnik News,* at the behest of the European Council shortly after the invasion of Ukraine in 2022. This was subsequently upheld by the Court of Justice of the European Union, given the clear alignment of the news coverage on both channels with the positions held by Moscow and their capacity to influence public opinion in a way that could benefit a foreign state.

7 Populism and international relations

The rise of populism is linked to the crisis of the democratic model resulting from the twilight of ideologies and post-politics. On a larger scale, this has led to the liberal order being called into question, first at the national level and subsequently at the international level. This manifests itself in the clash between liberal and illiberal regimes—as well as between democracies and dictatorships—which has shifted the struggle to a global scale.

In short, a country's foreign policy is an extension of its domestic policy and is therefore inseparable from it. This is all the truer in a democracy, where continuity and consistency are particularly essential. However, it sometimes happens that a particular country's foreign policy serves not so much its interests or values as the domestic agenda of a populist leader and his personal interests. As a result, state policy can undergo a complete and incongruous shift, making it difficult to predict. This, or the mere possibility of it, generates uncertainty at a global level.

7.1 National populism

Populism is, not infrequently, closely linked to nationalism. These are undoubtedly distinct concepts—both incomplete and porous—but they are not entirely independent of one another. They share quite a few values, starting with their emotional, if not anti-rational, nature.

Not surprisingly, nationalism, Schiller's 'crooked twig', is an ideology of identity; that is to say, it finds its foundation in a certain collective identity. Populism also belongs to this logic and, as such, serves to articulate it. The difference between the two lies in the fact that whilst nationalism relies on the inside-outside logic, populism adds to this the top-bottom confrontation, that is, between the people and the elites (Fernández-García and Valencia, 2022).

Following this logic, 'national populism' is a discourse that articulates the frustrations of the nation-people along the vertical axis of populism; that is, it pits the people against elites, whether national or international. It thus refers to the political primacy of national identities in the international context by aligning both spheres.

In this sphere, national-populist actors claim to embody and represent the sovereignty of the people—defined in strictly national terms—in opposition to elites and power structures based abroad, which are presented, once again, as anti-democratic, oligarchic and corrupt, but also as dominating national elites that act as their branches. Such discourses can prove particularly appealing in opportunistic crisis contexts and serve to exonerate through their external projection (Fernández-García and Valencia, 2022).

Populism is thus a logic that feeds off nationalism, as it involves an overvaluation of national identity. To this end, it likewise draws on the mythologisation of the past and of traditions. This explains its protectionist and conservative nature, and its opposition to any community-based project or multicultural logic that dilutes the nation.

7.2 Anti-globalism and anti-regionalism

Globalisation has brought about a shift in the world order, within the context of which there has been a loss of relative power in the West as a result of the 'rise of the rest' referred to by Fareed Zakaria. In terms of purchasing power parity, according to the World Bank in 2023, China accounted for 18.76% of global GDP, the US for 14.8% and the EU for 14.68%. The sum of the three is less than 50%.

There is a backlash against the system of rules that has brought about this change, and there are calls for a return to power politics as a way of overcoming an undesirable trend resulting from the current multilateral regulatory framework. Populism, in this geopolitical context of the West's loss of relative power, may even be a precipitating factor.

But it is also true that globalisation has caused an internal rift in countries such as the United States. This is the result of the unequal distribution of the benefits and burdens that globalisation has brought to the country. This has made it a particular source of grievance for a segment of the population and, consequently, has sparked protests against it, which populism exploits.

The so-called 'losers of globalisation' claim that there has been a loss of control, but also of the people's autonomy to determine national economic and employment policy. They infer from this what is, in effect, the hijacking of both democracy and national sovereignty itself.

This is because national populism also regards multilateral or community projects as undermining the decision-making capacity of the nation-people and, as such, as an undue restriction on the power of the state (Aranda, 2025). The tensions this causes within regional organisations such as the European Union are evident.

Globalisation, however much it may be a process of cultural rationalisation imposed by the dominant culture—which is, after all, Western—implies an exchange from which a degree of mixing follows, however minimal it may be. And hence, once again, the reactive and anti-globalisation nature of populism, even in the West, which is the very cultural axis it draws upon.

Similarly, populism opposes the cultural hybridisation advocated by globalisation and, of course, takes a stand against migratory flows, using xenophobia to foster mistrust among the population.

In doing so, it also gains support. And this, despite the fact that such migration—which is a factor of interpenetration and cuts across the inside-outside logic—responds to a powerful demand for labour from national economic actors, particularly in the West, and is, moreover, the result of the demographic problems it suffers, a sort of demographic winter.

We are facing a postmodern form of tribalism that has managed to shape the political agenda of the West. This is part of the backlash against policies aimed at resolving humanity's common problems, from Covid to the environment. Thus, the absence of a specifically national responsibility or a clear attribution is often highlighted, along with the costs arising from national efforts in this regard or their asymmetrical nature. This hinders any intended global agreement, such as on the issue of the global commons: cyberspace, outer space, the environment or the high seas.

It is a reactionary movement—otherwise fully in keeping with the Hegelian nature of globalisation—against what has been termed liberal cosmopolitan commitments, that is, against cultural and lifestyle tolerance, international cooperation, fundamental rights and freedoms, etc. It is a 'traditionalist' or conservative reaction opposed to the dominance of post-materialist, cosmopolitan and liberal values (Aranda, 2025).

It is interesting to bring up in this context, by way of example, the thought of Alexander Dugin. He creates a critical blend of liberalism, postmodernism and Marxism, which he intertwines with classical fascism to distil a whole political theory from the mixture. Thus, starting from the idea of *Dasein* [being] formulated by Martin Heidegger, he moves from the individual to the collective, to the 'people', and from there to 'our people' (Galcerán, 2022).

The Russian people, he argues, are entrusted with a messianic mission: to oppose the global and universalist liberalism that is destroying the world. For, in his view, liberalism has no place in Russian thought and is being imposed to justify a consumer society that offers nothing of value—just as neither postmodernism nor the ideological framework of the New Left do (Galcerán, 2022).

Their offer to the Russian people is, in Dugin's view, extraordinarily precarious and devoid of any future. In fact, he believes that these foreign ideas are destroying rational society, which is why he calls for a 'crusade' against liberalism and neoliberalism, postmodernity, post-industrial society, globalisation and its logistical and technological foundations (Galcerán, 2022). These assertions are not far removed from President Trump's view of Europe.

Thus, he reformulates and gives coherence to a populist alternative by weaving the present with Russia's own traditions and history. In doing so, he reaffirms Russian identity at a time when it is being undermined and reinforces a national civilisation whilst emphasising the existence of a powerful identity of its own—the Eurasian one—and does so through a call to action:

> 'There is no barrier to the integration of the vast Eurasian space surrounding Russia, as these regions were politically, culturally, economically, socially and psychologically united over the course of many centuries. The western border of Eurasian civilisation lies slightly east of Ukraine's western border, which is why the newly established state is unviable and fragile' (Galcerán, 2022).

This vision is not strictly conservative, but rather reactionary and imperialist in nature. His ideas serve as the 'fig leaf' that President Putin uses to provide cover for internal control of a country with low democratic standards; but also for external expansionism. Russia seems to be able to exist only as an empire, and Dugin provides it with a narrative to match.

In short, the fact that populist parties uphold shared values and proposals—as significant as the very questioning of liberal democracy—acts as a mutual draw and, consequently, fosters alliances. Thus, their anti-liberal agenda is not confined to the national sphere; rather, despite its individualistic and tautological nature, through emulation it generates new international and regional alliances that are hardly compatible with multilateralism and global governance. This reinforces the notion of a clash between liberal and illiberal orders, which also extends to the international sphere.

This is because the populist agenda, expressed in national terms through slogans such as 'America First', emphasises the full and unrestricted use of national power and a willingness to make, at most, transactional concessions. Yet it transcends the national sphere and seeks ideological affinities to forge alliances internationally, or even fosters national parties of a similar persuasion.

The result is a certain convergence among populist leaders across the West in the transformation of foreign policy. This is evident even in the creation of parliamentary groups that bring them together and serve to demonstrate a shared platform. Furthermore, European populist movements have forged links with their American counterparts, forming what sometimes appears, despite its inconsistencies, to be a united front.

This will be formally endorsed by the US National Security Strategy of 2025, in which, in a manner at times even reminiscent of Dugin, criticism is levelled at Europe's decadence and its loss of roots, in line with the so-called 'Great Replacement' theory—a formulation lacking any real basis whatsoever and yet widely disseminated by extremist movements— whilst calling for cooperation with 'patriotic parties' to prevent it.

Such parties act as a centrifugal force and serve to draw in all those who oppose certain policies within regional and even global organisations, helping to coordinate their efforts and reinforce their narratives.

Conversely, and viewed from the opposite perspective, this strategy carries the risk of delegitimising those political options which, whilst legitimate in themselves, may be accused of being unpatriotic and acting as a fifth column should they act, or be perceived to act, in the service of interests identified by a foreign power. We are thus faced with a two-pronged interference whose result is damage to European democracy at all levels and the weakening of its institutions, a fact that is far from welcome.

This has also led to the establishment of new thematic agendas, geographical priorities, unilateral use of force and anti-liberal rhetoric that impede or undermine international consensus in areas such as the environment, migration, trade, peace-building processes, the fight against drug trafficking or the very use of force, thereby confirming the influence of populist rhetoric and practices in foreign policy (Aranda, 2025).

8 The case of Trumpism

President Trump's policies have, due to their uniqueness, been given a name of their own, a brand: Trumpism. These policies are characterised by particular ways of operating. The reason is that they resort to 'alternative facts', are frequently disruptive in nature—as are the terms used to articulate them—obvious exaggerations with hyperbolic elements—and even the gestures that accompany them—sometimes at odds with basic standards of courtesy. Through this, they always seek to demonstrate power.

In this way, it responds to the country's loss of relative power in the context of globalisation. And it does so through political theatrics, with an entire geopolitical narrative being constructed from instances of a lack of decorum in diplomatic practice.

In this vein, any decision to shift power to the global arena is amplified by the media, creating a brand and capitalising on it. But this, paradoxically, amounts to a public acknowledgement of its lack. As De Gaulle said, 'silence is the language of power'. Words and gestures complement power. Their overuse betrays its absence and, consequently, its substitution.

This is accompanied, in practice, by actions such as those carried out in Venezuela, which were justified on grounds of national security and drug trafficking, although it was hinted that the underlying issue was oil. This is also a warning to neighbouring and dissenting countries.

It should be noted, incidentally, that these actions involve focusing the fight against drugs on external supply—rather than internal demand—which shifts the burden of a struggle for US benefit onto Central Americans, whilst ignoring the public health dimension of a problem that has led to more than 100,000 deaths a year from overdose in the US.

Without policies addressing the root causes, no programme works in the long term, however much it may appear otherwise and however much it may be misleadingly appeasing the concerns of certain electoral niches. The same applies to migration policies, as these arise from the country's economic needs; or with regard to the regimes in Cuba and Venezuela, which have many naturalised Americans and companies with business interests

And all of this is carried out in a strident manner: abuse of force, breach of public international law, resorting to 19th-century norms and sending migrants to substandard prisons or to El Salvador, defying the US judiciary, interfering in European politics, etc.

These are some of the methods; then there is its political agenda, which also represents a breakdown in the foreign policy the

United States has pursued, however much it may seem like yet another eccentricity.

It is true that, until the Second World War, this country was torn between isolationism and a global policy, with Europe being the key to this strategic duality. But its National Security Strategy 2025—which departs from traditional models for this type of document and is imbued with ideological overtones—identifies neither Russia nor China as enemies, but rather, in a sense, its traditional ally, the European Union, which, however, it does not mention.

In fact, the president already championed Brexit during his first term and now promotes policies of the same ilk by supporting Eurosceptic governments and parties with whom he interacts and whom he encourages and promotes. One might therefore think that he is seeking to foster a strategy of joint action that could undermine from within what the United States undermines from without.

There is neither past nor allies, only interests. His commitment to transactional arrangements establishes a new starting point and disregards the benefits gained from the relationship thus far. He seeks a new balance in the distribution of burdens, and exploits the strategic dependencies created amongst his partners for his own benefit. This weakens international organisations such as NATO and reduces the predictability and reliability of US foreign policy.

But this is by no means an irrational actor. Such policies also stem from the need for what has come to be known as 'imperial overstretch'; that is, they are a consequence of the fact that its role as a global power is becoming difficult to sustain from an economic perspective due to the loss of relative power. Thus, US public debt stood at 122% in 2024, which has even caused the country to lose its top credit rating. And private debt stood at 142%. The sum of the two is 264%, an exorbitant figure, which is, incidentally, not far off China's 287%, to say the least.

The core of President Trump's controversial policy is directly linked to the country's financing. This ranges from tariffs to demands on NATO member states for higher levels of military spending; investment commitments in the US negotiated with the EU and other actors alongside the tariffs; the restructuring of US military deployment, etc.

The United States perceives a kind of decline—a striking loss of its relative power—in a world organised according to rules and seeks to reverse this trend. And this despite the fact that it contributed to the establishment of these rules and has benefited from them.

That is why it has begun to retreat into its own hemisphere. It had previously been sheltered by its global leadership; but as this has weakened, other powers, such as China, have emerged to challenge its hegemony in that very region. This retreat is the reason for the weakening of ties with Europe, whose involvement is neither necessary nor desired in this process.

As for President Trump, in addition to his use of tariffs, one might cite his statements on Canada or Greenland, the capture of President Maduro, interventions to curb drug traffickers, or his proposal to rename the Gulf of Mexico. This, coupled with what he has termed the 'Trump corollary' to the Monroe Doctrine in his National Security Strategy 2025, constitutes an explicit acknowledgement of this withdrawal from what is one of Haushofer's pan-regions. His strategy is regional leadership, now rebranded as a sphere of influence.

The histrionics of political theatrics are thus a means serving a strategic choice and are disconnected from the social discontent that lies at its root. Moreover, should his strategic model fail, given the personalism it espouses, the responsibility for this would fall on a president who presents himself in such an extravagant manner, shielding the American people from the consequences of his actions.

Conclusions

Let us not forget that populism emerges as a response to a certain reality: a deficit in political representation inherent in the model of representative democracy. Democracies incorporate an oligarchic or unequal component resulting from the imperfections, fictions and assumptions that underpin their legal and political construction, in which a multiplicity of concepts and realities are reconciled.

Populism exploits the idea of the general will to seize power. It thus represents an attempt to address these shortcomings and restore the people to their natural power, but it is also a sham.

Populism is not strictly an ideology, but a political strategy. It is neither right-wing nor left-wing, but cuts across the entire political spectrum, even though it is particularly useful to the extremes due to the inherently radical nature of the methodology it advocates for its approaches: a confrontation between the people and the elites. And it draws those who employ it towards these extremes by sheer logical consistency.

The problem is that the cost of such a restoration is the undermining of the institutional architecture that acts as a counterweight to its power, and also of the institutions that serve to bind society together. And it is no minor matter that democracy requires a loyalty to which populism does not commit. In the international arena, this is exacerbated, as seen in its stance against multilateralism or its detachment from partners and allies.

The twilight of ideologies that has accompanied postmodernity has led to a reduction in the space for politics and its hollowing out. Populism thus involves the mobilisation of a chain of unified yet heterogeneous demands that serves to overcome the post-politics against which it reacts, despite following in its wake.

The relationship between populism and democracy is thus a difficult one, not because populism is opposed to a formal concept of democracy or to the term itself, but because it claims to oppose the existence of limits on the will of the people, which leads it to clash with anything that implies permanence—that is, with institutions and the state apparatus. In any case, the result is the weakening of society, beyond the areas or aspects affected by the weakening of the political framework. Furthermore, if it gains ground, it leads to the practical erosion of democracy due to the presence of authoritarian tendencies associated with political action.

And such policies serve to enshrine those who promote them. However, neglecting society's fundamental interests compromises the populist leader's future legitimacy, if not making them a prisoner of their previous decisions.

Communication strategy is one of the keys to populism. In the new politics, the conventional narrative once anchored in an ideology that bound and explained everything has now disappeared. Verifiable data and stories, however open to interpretation, have been replaced by fragmented narratives based on a diffuse plot that employs black-and-white logic to polarise the political landscape and assert itself on issues that are not the actual cornerstones of real politics and which, in fact, may have nothing to do with it.

Narratives are what give meaning and structure to society. Populism thus seeks to take over the news agenda and turn it into a political agenda, making it an expression of the will of the people. By undermining the media through disinformation, it eliminates an independent and key mechanism of control within the institutional architecture.

Polemological factors are the elements underlying the origins of conflicts. Populism is a polemological factor insofar as countries can project themselves onto the international stage based on the agenda of the populist leader—which may be domestic or even personality-driven—thereby introducing uncertainties into it. Furthermore, it interferes with the news agendas of third countries to align them with its own, favouring parties that support its theses.

Populism, in a geopolitical context of the West's loss of power resulting from the levelling effect of globalisation, can be a precipitating factor and make political governance difficult when there was a time in the past that was better.

It thus takes the form of a backlash movement accompanying the advances of globalisation, transferring its dynamics to the regional and global stages in the form of a national populism that hinders agreements whilst promoting its own alternative agenda. This emulation encourages the replication of similar models in other countries that collaborate with one another—sometimes despite having conflicting ideological models—staging a clash between liberal and illiberal democracies which, in any case, weakens the West globally and, domestically, the institutional architecture of democratic countries.

This weakening of the West, its inward-looking stance, is further compounded by the fact that it is taking place against a backdrop of strategic competition with China. The world is being reshaped by shifting balances of power and the erosion of international law. The rules that international society has established cannot prevent these changes, but by affirming their validity and seeking to reform them, they can make them more orderly. Disregarding them, as populism does, causes changes to unfold at a faster pace, makes the process more ungovernable, and makes it more likely that, in the end, it will derail.

Bibliography

Ahedo, U. (2023). Populism, a controversial concept and word [online]. *RIPS: Journal of Political and Sociological Research*. 22(1). [Accessed: 2026]. Available at: https://revistas.usc.gal/index.php/rips/article/view/8278/12990

Aranda Bustamante, G. (2025). Populism, foreign policy and transnational alliances [online]. *Politics and Society*. Ediciones Complutenses. 62(2). [Accessed: 2026]. Available at: https://revistas.ucm.es/index.php/POSO/article/view/103493

Fernández-García, B. and Valencia Sáiz, Á. (2022). Populism and nationalism in Western Europe: a proposed framework for analysis. In: Valencia Sáiz, Á. and Fernández García, B. (eds.). *On the margins of liberal democracy: populism, nationalism and ideological radicalism in Europe*. Granada, Comares, pp. 71–93.

Foucault, M. (1976). Lecture of 14 January 1976. In: Various authors (eds.). *Microphysics of Power*. Madrid, La Piqueta.

Galcerán, M. (2022). Putin's intellectuals: Alexander Dugin, reader of Heidegger [online]. *El Salto.* [Accessed: 2026]. Available at: https://www.elsaltodiario.com/pensamiento/intelectuales-putin-alexander-dugin-lector-heidegger

García Caneiro, J. and Vidarte, F. J. (2009). *War and Philosophy*. Valencia, Tirant Lo Blanch.

Gerbaudo, P. (2023). Populism and social media: an elective affinity? [online]. In: Guerrero-Solé, F., Mas-Manchón, L. and Virós I Martín, C. (eds.). *Far-right populism and social media. Is the future of democracy at stake?* Creative Commons. [Accessed: 2025]. Available at: https://repositori.upf.edu/server/api/core/bitstreams/51cec47b-e2d9-4eaa-beff-02d3a9d41ab8/content

Gilli, A. (2019). Preparing for "NATO-mation": the Atlantic Alliance towards the age of artificial intelligence [online]. NATO Defense College. [Accessed: 2026]. Available at: https://www.ndc.nato.int/download/preparing-for-nato-mation-the-atlantic-alliance-toward-the-age-of-artificial-intelligence/

Gottfried, J. and Shearer, E. (2016). News use across social media platforms. Pew Research Centre & Knight Foundation. [Accessed: 2025]. Available at: http://www.journalism.org/2016/05/26/news-use-across-social-media-platforms-2016/

Gratius, S. and Rivero, Á. (2018). Beyond left and right: populism in Europe and Latin America [online]. *CIDOB Journal of*

International Affairs. No. 119, pp. 35–61. [Accessed: 2026]. Available at: https://www.cidob.org/publicaciones/mas-alla-izquierda-derecha-populismo-europa-america-latina

La Trivial. (2024). Laclau, the theorist of populism [online]. *Filosofía&CO*. [Accessed: 2025]. Available at: https://filco.es/laclau-diez-claves-populismo/

Lenoir-Grand Pons, R. (2017). When information seeks to destabilise the enemy [online]. *La Grieta.* [Accessed: 2025]. Available at: http://lagrietaonline.com/cuando-la-desinformacion-busca-desestabilizar-al-enemigo/

Manrique, J. L. (2016). Populism and post-truth: mere trends ? [online]. *Revista Inmanencia:* Journal of the HIGA Eva Perón Interzonal general Acute Care Hospital. Editorial, 5(1) 161–165.

Marina, J. A. (2017). Why the information society is on the verge of collapse [online]. *El Confidencial*. [Accessed: 2026]. Available at: https://www.elconfidencial.com/alma-corazon-vida/educacion/2017-06-27/sociedad-informacion-fracaso_1405499/

Merchan Gabaldon, F. (2017). Truth versus post-truth*. La Tribuna del País Vasco.*

Prior, H. (2021). Digital populism and disinformation in the age of post-truth [online]. *Communication & Society.* 34(4), pp. 49–64. [Accessed: 2026]. Available at: https://www.researchgate.net/publication/355062496_Populismo_digital_y_desinformacion_en_tiempos_de_posverdad

Rivera Magos, S. and González Pureco, G. (2024). Populism, disinformation and political polarisation in the social media communication of Latin American populist presidents [online]. Mexican Journal of Public Opinion. No. 36, pp. 79–107. [Accessed: 2026]. Available at: https://revistas.unam.mx/index.php/rmop/article/view/86828

Torre, Carlos de la. (2022). Populism: conceptual strategies and debates [online]. *RIPS: Journal of Political and Sociological Research*. 21(2). [Accessed: 2026]. Available at: https://revistas.usc.gal/index.php/rips/article/view/8791/12448

Vosoughi, S., Roy, D. and Aral, S. (2018). The Spread of true and false news online. *Science*. 359(6380), pp. 1146–1151. DOI: 10.1126/science.aap9559

Composition of the working group

Chair	**Mr. José María de Areilza Carvajal** *Full professor and holder of the Jean Monnet Chair at ESADE and Secretary general of the Aspen Institute Spain*
Member and Coordinator	**Mr. Federico Aznar Fernández-Montesinos** *Commander Spanish Armada (Reserve), Phd. Analyst at the Spanish Institute for Strategic Studies*
Vocales	**Mr. Fidel Sendagorta** *Ambassador of Spain*
	Mr. Jose Ignacio Torreblanca *Professor of political science and public administration at the uned and distinguished policy fellow, geoeconomics and technology programme, european council on foreign relations*
	Ms. Eva Borreguero *Lecturer in Political Science. Department of Political History, Theory and Geography. Faculty of Political Science and Sociology* *Complutense University of Madrid*
	Ms. Inés Arco Escriche *Researcher, Barcelona Centre for International Affairs (CIDOB)*
	Mr. José María Calvo-Sotelo *Associate professor at ie business school and spega*

Mr. Miguel Hernando de Larramendi
Professor of Arabic and Islamic Studies at the University of Castilla-La Mancha and director of the Group for the Study of Arab and Muslim Societies (GRESAM)

Mr. Guillermo Fernández de Soto
President of the Colombian Council on International Relations (CORI), former Minister of Foreign Affairs (1998–2002) and former Ambassador to the United Nations

Mr. Andres Rugeles
Vice-President of the Colombian Council on International Relations (CORI), former Ambassador and Alternate Representative to the United Nations

PUBLICACIONES DE DEFENSA

GOBIERNO DE ESPAÑA
MINISTERIO DE DEFENSA
SUBSECRETARÍA DE DEFENSA
SECRETARÍA GENERAL TÉCNICA
SUBDIRECCIÓN GENERAL DE PUBLICACIONES Y PATRIMONIO CULTURAL