

GEOPOLITICAL UPHEAVALS: IMPLICATIONS FOR THE GLOBAL SOUTH AND DEVELOPMENT

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This article argues that global development cooperation has entered a period of profound transformation driven by geopolitical upheaval and the contestation or even collapse of long-standing policy norms. The second Trump administration marks a decisive rupture in the post-2000 consensus around multilateralism, aid effectiveness, and global public goods. Through drastic budget cuts, the dismantling of USAID, and U.S. withdrawal from UN institutions, development assistance has been redefined as a transactional instrument of domestic and geopolitical interest rather than a collective global endeavour. This shift coincides with a broader reassertion of geopolitics in development agendas, as concerns with energy security, migration, and raw material access increasingly shape donor priorities. At the same time, the Global South has emerged as an active, heterogeneous actor rather than a passive recipient. China's Belt and Road Initiative and related frameworks, culminating in the 2025 Global Governance Initiative, illustrate the reconfiguration of development as a key site of strategic competition. For Europe, the erosion of U.S. leadership creates both risk and opportunity: to lose further influence or to rebuild credibility through reliability, equality, and long-term partnership. The paper concludes that development policy must now be understood as an integral part of international strategy in an era of geopolitical contestation.

INTRODUCTION: WHAT IS THE BIG PICTURE?

Global cooperation is a central prerequisite for addressing cross-border challenges, be it pandemics, violent conflict, or climate change. Although the need for more and higher-quality international cooperation is academically undisputed, the framework conditions for it have developed extremely unfavorably in recent years: populist and nationalist governments in the Global North and South, systemic competition between China and the United States, and an imperial Russian policy significantly impede international cooperation.

With Donald Trump's second term of office, enormous changes have taken place in international relations, not least in development policy: for a long time, the United States was the leading force in international development cooperation, both politically and financially. Yet already in the first months of President Trump's second term, the traditional role of U.S. development assistance was almost completely destroyed in its conceptual, structural, and financial foundations (Haug et al. 2025; Klingebiel/Sumner 2025; Taylor 2025; Ishmael 2025).

From drastic budget cuts to withdrawal from United Nations (UN) organizations to the winding down of the U.S. development agency USAID, the measures taken by Trump and his team have not only far-reaching impacts on a multitude of humanitarian and development programs, but are likely to shape the entire policy field in a lasting way, in particular by adding a significant loss of importance.

For many actors in the Global South, a second term for Donald Trump is not necessarily a setback. This new situation could enable the Global South to reposition itself within a changing international system including through closer cooperation with China or Russia. Such a multipolar framework does offer the Global South greater room for maneuver and more partners. However, it also carries the risk of intensifying geopolitical rivalries. Countries of the South could come under greater pressure to align with one of the competing blocs, which would jeopardize their political autonomy and deepen dependence on dominant partners. For Europe, this could mean a decline in influence if actors in the Global South increasingly orient themselves toward other power centers.

Trump's explicit anti-multilateralist stance is already affecting key international organizations just weeks after he took office again, through budget cuts for development programs or even withdrawal from the United Nations entities deemed not to serve U.S. national interests. This will destabilize the financing of peace operations, human rights work, and humanitarian assistance, with massive

effects on conflict-affected and low-income countries (Haug et al. 2025; Klingebiel/Sumner 2025).

The origins of Western development policy are directly linked to geopolitical interests. In that sense, today's dominance of geopolitical aspects is not new. However, the current framework conditions differ significantly from those of the Cold War, particularly with regard to climate change as a fundamental global challenge and the new global role of many actors from the Global South.

Development policy, understood primarily as a means of poverty reduction, is today largely outdated as a guiding paradigm. This is due, on the one hand, to the improved socioeconomic situation of many developing countries compared to the past. On the other hand, the focus has shifted: global challenges require new responses, such as the provision of global public goods, including security or the protection of natural life-support systems (Baydag/Klingebiel 2023). Against this backdrop, Western development policy must newly consider how to shape its relationship to other policy fields and interests. Times of fundamental upheaval demand adjustments. The question of the relationship between values and interests is central here, both in principle and for concrete decisions.

THE GLOBAL SOUTH AS AN ACTIVE ACTOR

Profound geopolitical upheavals have shaped international relations in the recent past. The systemic confrontation between China and the United States, Russia's attack on Ukraine, the seizure of power in Niger in 2023 by putschists and similar events previously in Mali and Burkina Faso, the war in the Gaza Strip following the terrorist attacks by Hamas on 7 October 2023, and, not least, the complete takeover by the Taliban in Afghanistan all demonstrate that the environment for global cooperation efforts has clearly deteriorated. In recent months and years, global cooperation has suffered significant setbacks. Populist and autocratic tendencies in all world regions also seriously undermine efforts toward global cooperation. The scope for joint solutions, for example in combating climate change, has become much narrower and itself becomes part of international lines of conflict.

The Global South is to a considerable extent the arena of these conflicts, which are shaped politically, economically, and often militarily. Yet, and this is a key difference

from earlier times, the countries of the Global South (Ero 2024; Ikenberry 2024; Haug et al. 2021; Fortin et al. 2023; Chaturvedi et al. 2021) are not a homogeneous group, but central co-shapers of international relations (Ishmael 2022). This applies primarily to China, but also to India and other actors in the BRICS group and beyond.

The positioning of India, South Africa, Brazil, and also smaller, internationally proactive states such as Rwanda toward Russia and China is of considerable international significance. This is evident, for example, in voting patterns in the UN General Assembly, or participation in Chinese development initiatives. Countries of the Global South are key partners on questions of energy security, access to critical raw materials, and thus highly relevant for a world shaped by geopolitics and geoeconomics. Consequently, the "Zeitenwende" is associated with a strong increase in the importance of the Global South for Europe.

Geopolitical upheavals ultimately affect all policy areas in Europe and other regions of the OECD. This applies to classic fields such as foreign and security policy, climate and energy policy, and increasingly to areas such as agricultural or science policy. Western development policy focuses on partner countries and actors in the Global South (Klingebiel 2022; Howe/Klingebiel 2024), a fundamental characteristic of this policy field. Accordingly, the question arises: what do these changes mean for development policy concepts and narratives, and likewise for operational implementation?

DEVELOPMENT POLICY AFTER THE HONEYMOON PHASE: GEOPOLITICS THROUGH DEVELOPMENT AGENDAS

In Western development policy, Russia's attack on Ukraine has massively reinforced an already existing trend: development issues today are much more closely intertwined with geopolitics and geoeconomics (in particular energy and raw material security) than in previous decades. After the end of the Cold War, there was a phase in which development policy concerns could be pursued relatively free of geopolitical considerations. The guiding questions of that phase were: "How can development policy be designed to be as effective as possible in partner countries?" and "How can a long-term global sustainability strategy be supported?"

Key milestones of this era include the Millennium Development Goals (MDGs) adopted in 2000 and the Sustainable Development Goals (SDGs) of 2015, based on the 2030 Agenda. The ambitious Paris Climate Agreement of 2015 also shows that it was temporarily possible to seize an international window of opportunity for global agreements.

During this period, the development policy of Western countries, especially those in the OECD's Development Assistance Committee (DAC), was largely able to focus on improving its effectiveness in partner countries (Bracho 2021; Bracho et al. 2021). In retrospect, it was a phase in which the policy field was able to professionalize in a comparatively undisturbed manner. Yet for several years now, a new phase has begun that can be described as the post-aid effectiveness phase (Brown 2020; Calleja et al. 2022; Esteves/Klingebiel 2021). Early signs were already visible in the wake of the 2008 financial crisis. Today, it is unmistakable that development policy is undergoing a fundamental transformation and may, as a policy field as it existed until the mid-2020s, in the future be continued in a marginal form or with a different orientation regarding its poverty-focused objectives (Sumner/Klingebiel 2025; Ishmael 2025).

Populism under U.S. President Trump (both during his first and especially his second term) acts as a catalyst for the decline of cooperative global solutions. The United Kingdom, which previously played a particularly active and visible role as an international agenda setter on development policy issues, has also largely withdrawn from this role at the latest since the premiership of Boris Johnson (Lowcock/Dissanayake 2024).

The phasing out of the old paradigm of development policy designed to be as effective as possible can be readily observed. That said, it is less clear what the new profile of development policy will look like. Geopolitics became (again) a predominant factor.

A decisive turning point are China's development initiatives. Since the beginning of the 2000s and particularly since the Congress of the Communist Party in 2017, China has become a significant geopolitical actor in the Global South and beyond (Nath/Klingebiel 2023; Cash 2022). The "Belt and Road Initiative" (BRI), implemented since 2013, has set new benchmarks for how an infrastructure initiative can massively transform countries as in the case of Pakistan (Ali 2025). BRI is not only aimed

at developing countries but encompasses a total of 180 countries and institutions. BRI in particular has evolved from a rather marginal development topic into a main instrument of geopolitical power politics.

TRUMP'S SECOND TERM: A GAME CHANGER

During his second term, President Trump is using executive orders and deadlines in an almost inflationary way. On the day of his inauguration (20 January 2025), he set a 90-day deadline to review U.S. development cooperation ("Reevaluating and Realigning United States Foreign Aid"). Another deadline announced on 02 February 2025 envisaged a review of participation in and support for international organizations ("Withdrawing the United States from and Ending Funding to Certain United Nations Organizations and Reviewing United States Support to All International Organizations") within 180 days.

Both reviews followed no discernible criteria: what are the standards of review, who is conducting the analyses, what are the results of the review? Nevertheless, even before reaching the respective deadlines, it was clear for both (overlapping) topics that the second Trump administration would proceed rigorously. It wound down the development agency USAID, drastically cut U.S. development cooperation funds, and has largely failed to meet its financial obligations to international organizations both for development policy and for other tasks.

Both processes, regarding U.S. foreign aid and membership in international organizations, have already had significant impacts, precisely because of their unstructured and crude implementation. The consequences include avoidable human suffering (Medeiros Cavalcanti et al. 2025), particularly in many African countries, as well as a massive financial burden for the United Nations, as is evident in the ongoing UN80 reform process (Ryan 2025).

It is important to ask to what extent U.S. budget cuts have, for example, resulted in people no longer having access to life-saving supplies such as HIV/AIDS medications (Medeiros Cavalcanti et al. 2025).¹ Rather little attention has been paid to the fundamental shift in underlying values: what does it mean when the United States, as a global superpower, ignores even a fairly general global sustainability agenda (the 2030 Agenda) and its 17 Sustainable Development Goals, interpreting them

instead as “soft global governance” allegedly directed against American interests?

These developments reflect a deeper trend. The Trump administration is pursuing an explicitly anti-multilateralist policy based on national sovereignty (with restrictions for other countries), geopolitical maneuvering, and crude transactional economics. Conspiracy theories served to justify measures such as the crude winding down of US-AID (Moynihan/Zuppke 2025). Global norms, including the SDGs, are portrayed as a threat to U.S. interests. This is precisely because they foster cooperative forms of governance. Withdrawal from international organizations, disregard for established norms (up to and including military threats against other countries), and open pressure on other states, as in the baseless genocide accusations against South Africa, indicate a fundamental paradigm shift. This shift tilts the balance between values and interests toward short-term, often coercive enforcement and at the expense of long-term global cooperation. Development cooperation became a deliberate symbol of the new course and a comparatively easy political casualty.

COLLATERAL DAMAGE

Since the beginning of U.S. President Donald Trump’s second term, it has not only been U.S. development policy that has had to fundamentally reorient itself. International development policy debates as a whole have also had to be realigned. This development exemplifies a deeper tectonic shift: the end of a phase of Western-shaped global cooperation and of the broad acceptance of rules-based collaboration, moving instead toward a multipolar but power-based and conflictual world order (Ishmael et al. 2025). All of this can be demonstrated all too clearly in the field of development policy.

“Project 2025”, developed under the leadership of the Heritage Foundation as a script for a second Trump term, did not envisage such a radical winding down of American foreign aid (Klingebiel/Baumann 2024). According to this script, development policy funds were to be returned to pre-COVID 19-levels and new substantive priorities set. A quasi-complete dissolution of the policy field, however, was not under discussion.

This applies all the more because American and international development cooperation has repeatedly been advanced by Republican presidents. PEPFAR (President’s Emergency Plan for AIDS Relief), a true international flagship initiative for treatment, prevention, and research on HIV/AIDS, was launched by President George W. Bush. The establishment of the entire international system of development cooperation was, from a U.S. perspective, a particularly effective instrument during the Cold War.

The Federal Republic of Germany and other European countries were urged by the United States to participate in development policy tasks so that developing countries would have an incentive to feel aligned with the Western camp. The institutional foundations, such as the establishment of the Development Assistance Committee at the OECD, and the rulebook defining what counts as Official Development Assistance (ODA) were created largely at the instigation of the United States. Not least, USAID was housed in the building named after a prominent Republican president: Ronald Reagan. This traditional Republican, often bipartisan, support for development cooperation was no obstacle for President Trump to initiate a complete U-turn.

DECODING THE CHANGING NORMS OF INTERNATIONAL COOPERATION

The ideological and political shifts in U.S. development cooperation and in other fields of international cooperation can be decoded through a 36-question questionnaire used by USAID and accompanying directives to delete key development terms from government documents. These actions can be understood as a set of norms for what remains of international development cooperation (Sumner/Klingebiel 2025). Terms such as “climate crisis,” “climate science,” “clean energy,” and “equality” are deleted. Five core principles can thus be discerned: (1) the dismantling of global governance structures, (2) an ideology of “anti-anti-Americanism,” (3) priority for border security over development objectives, (4) rejection of a climate and DEI (Diversity, Equity, Inclusion) agenda, and (5) the necessity of a direct economic benefit for the United States. These principles are not merely bureaucratic adjustments but stand for a strategic reordering of development cooperation in favor of U.S. domestic and economic priorities. It is no longer guided by shared values or technical objectives but serves as an instrument of ideological enforcement and transactional nationalism.

In several respects, at least not all five core principles are complete inventions of the Trump administration. The European Union has for years used development cooperation funds for migration agreements with transit and origin countries as in the case of Tunisia. Donor countries such as the Netherlands and, under the current coalition agreement, Germany increasingly foreground the economic benefit for their own economies. However, the rigor and ideological orientation toward an anti-climate and anti-DEI ideology represent a hitherto unprecedented negative quantum leap.

FUNDAMENTAL WEAKENING OF INTERNATIONAL DEVELOPMENT COOPERATION

All of this leads to fundamental changes at a systemic level: the global architecture of development cooperation is being severely destabilized by the U.S. withdrawal. Other donor countries have followed the example and/or find it easier to push through their own cuts. This applies to the United Kingdom, France, the Netherlands, and increasingly also to Germany and other European countries. The United Nations is paralyzed in large parts. The weakening of coordinating bodies, such as the OECD's development assistance committee, undermines proven principles of effectiveness and coherence. This not only creates a financial deficit but also a loss of legitimacy for a cooperation model previously shaped by the West.

This rupture in the international development landscape has short- and long-term humanitarian consequences. Refugee camps in various parts of the world have been massively under-supplied since the decisions of the Trump administration with negative repercussions on conflict situations (for example, in Sudan). Serious estimates suggest that, as a result of U.S. budget cuts to foreign aid, an additional 14 million deaths could occur by 2030 (Medeiros Cavalcanti et al. 2025).

REORIENTATION OF THE GLOBAL SOUTH

For many countries of the Global South, these changes constitute a watershed. The Global South is, of course, not a homogeneous bloc but a heterogeneous field of highly diverse interests, income levels, and systems of government (Haug et al. 2021). Development policy strategies must take this into account.

The U.S. withdrawal from the multilateral system does create new space for strategic reorientation. This is especially so for politically and economically strong developing countries through intensified South-South cooperation and closer relations with China and even Russia. Russia's capacity to act as a development policy actor is extremely limited in terms of financial volume and technical capabilities. Nevertheless, the country is trying and explicitly referring to the withdrawal of USAID in order to present itself as a partner that will in future make more development cooperation offers in the Central Asian countries.² A country like Indonesia has also announced an increase in its development policy efforts, citing the winding down of USAID.³

The scope for action newly gained by developing countries in recent years also brings new dependencies, increasing geopolitical fragmentation, and greater susceptibility to external political pressure. Actors in the Global South increasingly emphasize their independence through the attractive principle of "multi-alignment," (Ishmael 2024) yet many still get drawn into the undertow of global bloc formation.

Authoritarian regimes in the Global South interpret the withdrawal of the United States as an opportunity to expand their room for maneuver, while at the same time the influence of Western actors is waning as seen, for example, in various Sahel countries (Basedau 2025). The resulting new geopolitical dynamic is fraught with risks regarding new dependencies and strategic vulnerabilities.

The current situation makes it clear that the separation between development policy and geopolitics in Europe is becoming ever harder to maintain. Development policy was never been neutral. It has always also been an instrument of power-political interests. Yet in times of intensified systemic competition, it gains new significance: as a lever for shaping global ordering processes and as a means to strengthen or challenge rules-based, value-driven structures. From this arises a responsibility for European actors to position themselves more clearly, strategically, normatively, and institutionally. The new, close link between development and geopolitics at the European level is particularly evident in the "Global Gateway" initiative launched at the end of 2021, which aims to provide a European counter-offer to China's dominant, infrastructure-centered "Belt and Road" initiative (Keijzer 2024).

China's President Xi Jinping presented a new initiative at the widely noted meeting of the Shanghai Cooperation Organization (SCO) on 1 September 2025 in Tianjin: the Global Governance Initiative (GGI).⁴ With this, China now has five global "initiatives": the "Belt and Road Initiative" (BRI), the Global Development Initiative (GDI), the Global Security Initiative (GSI), the Global Civilization Initiative (GCI), and now the GGI.

According to President Xi, the GGI is intended to strengthen the central role of the United Nations and enable the equal participation of developing countries in global governance. The initiative is said to be based on five principles: (i) sovereign equality, (ii) respect for international law, (iii) commitment to multilateralism, (iv) a people-centered approach, and (v) a focus on concrete, implementable results.

Regardless of the extent to which China considers these principles binding for itself and adheres to them: the anti-multilateral and UN-critical narrative of the Trump administration is likely to be attractive to very few actors in the Global South. And Trump and other Western representatives overlook how important it is for countries in the Global South to have their concern with "development" taken seriously. The GGI, like other initiatives launched by China, also addresses this concern.

Sweeping cuts in development policy reinforce the perception that Western actors ultimately cannot be relied upon. The US withdrawal has disillusioned many partner countries. Trust is a good that cannot be valued highly enough in international cooperation. It is all the more important that Europe now sends signals: through reliability, through transparent processes, and through a willingness to work with partners on an equal footing to find solutions. The U.S. retreat marks a breach of norms that Europe can offset through strategic reliability.

Offers in development policy should be strongly oriented toward the perspectives and interests of partner countries. This is a constitutive feature of the policy field. To dismiss such an approach as unstrategic would be short-sighted. Precisely by way of shaping long-term relationships with actors in the Global South, development policy holds a crucial difference from other policy areas. Not every action and every project must serve short-term self-interest. Rather, the added value of this international cooperation lies in the long term nature of the partnership. Even in times when "hard power" is often at the

forefront, it would be short-sighted to forgo this "soft power." China, in particular, seems to have understood this premise especially well.

Development policy is under unprecedented pressure to reform, socially, politically, and structurally. This applies to a large number of OECD countries. Public and political backing is often dwindling, while at the same time global challenges such as climate change, migration, health crises, and geopolitical upheavals are increasing.

At the same time, the international framework conditions are changing: the Global South is more strategically relevant, as hardly any paper or speech by European political actors dealing with international issues fails to mention. Surprisingly, development policy has so far not benefited from this. The policy field must be able to make more explicit what its contribution is. Conversely, decision-makers and the media should look a little more closely, because the field is no longer identical with the more altruistic aid narratives presented in the recent past.

1 Some U.S. global health programs will likely continue despite Trump's aid reductions. HIV treatment (PEPFAR), polio, tuberculosis, malaria and parts of global health security are listed in the FY (Financial Year) 2026 budget request and framed within the "Make America Healthy Again" agenda. That said, the White House request would cut the State/USAID Global Health Programs account from about US \$ 10 billion dollars under the FY2025 to about US \$ 3.8 billion in FY2026. Final levels depend on Congress.

2 Russian Aid Agency Seeking to Fill USAID Gaps in Former Soviet Union." 2025. Eurasianet, July 10, 2025. <https://eurasianet.org/russian-aid-agency-seeking-to-fill-usaid-gaps-in-former-soviet-union>

3 https://asianews.network/indonesia-steps-up-as-global-development-donor-landscape-shifts/?utm_source=chatgpt.com

4 https://english.www.gov.cn/news/202509/01/content_WS-68b58afbc6d0868f4e8f53cd.html

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