Introduction: Multipolarization

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Multipolarization

Is the world really entering an era defined by multipolarity? What are the (potential) poles of such an order? How polarized are they? What are the implications of a multipolarized order? And how can the international community manage multipolarization?

Tobias Bunde and
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The notion of "multipolarity," though far from new, has become the buzzword of the day. Judging from political speeches and strategy papers, we are witnessing the emergence of a new multipolar order – or are already living in it.[1] As a simplified version of this narrative has it, the bipolar era of the Cold War gave way to a unipolar post–Cold War period, defined by US global hegemony. Now, we find ourselves at the dawn of an increasingly multipolar era.[2] Yet there are widely differing interpretations of what "multipolarity" might mean. And what leaders' references to "multipolarity" lack in conceptual clarity, they surely deliver in terms of emotionality. These appeals to multipolarity have been variously characterized as expressions of hope for global change, as "part of a power play" meant to court countries in the so-called Global South, or even as evidence of "intellectual avoidance" by those who prefer to ignore the dynamics of ramped-up bloc confrontation.[3] At its core, the debate over "multipolarity" reflects different views on the present and future international order. While there are many reasons to question whether the world is indeed already multipolar or will ever truly become so, today's world is – in more than one sense – shaped by "multipolarization."

On the one hand, "multipolarization" describes an ongoing power shift toward a world where a greater number of actors are vying for influence. On the other hand, it also captures the international and domestic polarization that comes with increasingly incompatible visions for the international order, making it ever more difficult for actors to agree on common solutions to shared global problems.

"This economic, political, and cultural rebalancing has now reached a point where we can contemplate real multipolarity. The BRICS itself is a statement of how profoundly the old order is changing."[4]

Subrahmanyam Jaishankar, Indian External Affairs Minister, BRICS outreach session in Kazan, October 24, 2024

Pole Positions: Uni-, Bi-, Multi-, or Nonpolarity?

The first dimension of "multipolarization" captures the widely perceived trend toward "multipolarity." In its most basic definition, "polarity" refers to the number of great powers in the international system. In a unipolar system, there is just one great power without any other rival powers. A bipolar system has two great powers, and a multipolar system has more than two powers, usually at least four or five.[5] These definitions may make it seem easy to classify the present system, yet even scholars of polarity struggle to interpret the current global order. There is no agreement on whether the world today is uni-, bi-, multi-, or even nonpolar. Nor is there consensus on which actors could be considered the relevant "poles" in the contemporary or future international order, as there are disputes on the definition of a great power and on the necessary threshold to qualify for that status.[6]

For some analysts, the world remains unipolar. While few still think of the United States as an all-powerful "hyperpower," defined by former French Foreign Minister Hubert Védrine as "a country that is dominant or predominant in all spheres,"[7] these analysts maintain that the global power shifts are less dramatic than often believed. Drawing on various key metrics, members of this school of thought argue that the US will remain the sole superpower: "The world is neither bipolar nor multipolar, and it is not about to become either."[8]

Some dimensions of the international system indeed continue to look very unipolar. According to estimates by the Stockholm International Peace Research Institute (SIPRI), the US still accounts for almost 40 percent of nominal global defense spending – with China, the second-largest spender, not even accounting for half of US military expenditure (Figure 1.1).[9] In contrast to all its potential competitors, the US has a truly global network of allies and partners and manages at least 128 overseas military bases in more than 50 countries around the world.[10] Likewise, the military-technological superiority of the United States and the rapid advancements in the complexity of military technology mean that China and other potential challengers have a harder time catching up than rising powers in previous eras did.[11] And while Donald Trump's election may signal the end of the Pax Americana and bring about a redefinition of the US's global role as the guardian of the international order, nothing suggests that Washington will give up its "top-dog" position in the near future. Indeed, the Trump administration may increase investment in defense and try to push back against China's continuous rise (Chapter 3).

Other sectors beyond the military also continue to be characterized by what could be described as a unipolar distribution of power. For instance, economists speak of a "unipolar currency world," with the US dollar as the dominant global currency.[12] Central banks around the world still rely on the US dollar as the key reserve currency (Figure 1.1).[13] The dollar also remains the most widely used currency for trade and other international transactions. While the BRICS countries have announced their intention to create a BRICS currency to reduce global dependence on the US dollar, the path to financial multipolarity, or "de-dollarization," seems steep and long and is certain to provoke pushback from the US. Even the BRICS Development Bank still operates mainly in US dollars.[14] From the perspective of the "unipolar" school, these and other examples show that those who argue that the world is already multipolar focus too much "on potential rather than realized power."[15]

"And together we will make America powerful again. We will make America healthy again. We will make America strong again. We will make America safe again. And we will make America great again."[16]

Donald Trump, then candidate for US president, campaign rally in Detroit, October 18, 2024

Other analysts conclude that the trends point toward a new bipolar era, in which the US and China are the only superpowers – with everyone else lacking either the economic or military capabilities to clear the great-power threshold.[17] In short, this group of scholars sees "the narrowing power gap between China and the United States and the widening power gap between China and any third-ranking power" as bringing about a new bipolar system.[18] China does not, they suggest, need to fully catch up with the United States for the system to become bipolar. Beijing just needs to be able to engage in a serious great-power competition with Washington.

From the US perspective, this is clearly true. The Biden administration's National Security Strategy of October 2022 described the People's Republic of China as "the only competitor with both the intent to reshape the international order and, increasingly, the economic, diplomatic, military, and technological power to do it."[19] Notwithstanding Russia's war against Ukraine and other potential threats, China has become the "pacing challenge" driving US military planning.[20] For the new Trump administration, which is concerned with US decline, China is clearly the top national security concern (Chapter 2). And as some scholars point out, comparisons with both historical and contemporary competitors suggest that the system is already bipolar. If we compare China's relative capabilities to the Soviet Union's at its Cold War peak, China is already the more powerful challenger to the United States – in almost all dimensions.[21] As political scientist Jennifer Lind concludes: "If the USSR was a superpower then, China is one today. The world is bipolar."[22]

Figure 1.1

Comparison of the G7 and BRICS across various (great-power) indicators

	Canada	France	Germany	Italy	Japan	UK	US	Brazil	China	India	Russia	South Africa
Democracy, scale 0–1	0.76	0.81	0.81	0.76	0.73	0.77	0.77	0.69	0.04	0.28	0.06	0.58
Rule of law, scale 0–1	0.8	0.72	0.83	0.66	0.79	0.78	0.7	0.5	0.47	0.5	0.43	0.56
Press freedom, scale 0–100	81.7	78.7	83.8	69.8	62.1	77.5	66.6	58.6	23.4	31.3	29.9	73.7
Perception of corruption, scale 0–100	76	71	78	56	73	71	69	36	42	39	26	41
Military spending, USD billions	27.2	61.3	66.8	35.5	50.2	74.9	916	22.9	296	83.6	109.5	2.8
Military spending, share of GDP, percent	1.3	2.1	1.5	1.6	1.2	2.3	3.2	1.1	1.7	2.4	5.9	0.7
Military spending per capita, USD	702	947	802	604	407	1,106	2,694	106	208	59	758	46
Number of active troops, thousands	67	204	181	161	247	144	1,326	367	2,035	1,476	1,100	69
Nuclear warheads, estimates	0	290	0	0	0	225	5,044	0	500	172	5,580	0
GDP, nominal, USD trillions	2.2	3.2	4.7	2.4	4.1	3.6	29.2	2.2	18.3	3.9	2.2	0.4
GDP, PPP, USD trillions	2.6	4.4	6.0	3.6	6.6	4.3	29.2	4.7	37.1	16	6.9	1
GDP per capita, nominal, USD thousands	53.8	48	55.5	40.2	32.8	52.4	86.6	10.3	13	2.7	14.9	6.3
GDP per capita, PPP, USD thousands	62.8	65.9	70.9	61	53	62.6	86.6	22.1	26.3	11.1	47.3	15.7
Global trade, percent of total	2.4	3.5	6.6	2.5	3.1	3.5	11.2	1.2	10.8	2.7	1.4	0.4
FDI net outflow, percent of GDP	3.9	1.3	1.8	1.3	4.3	1.9	1.6	1.2	1	0.4	0.5	-0.7
FDI net inflow, percent of GDP	2.2	0.3	0.4	1.8	0.5	-2.6	1.3	3	0.2	0.8	-0.5	0.9
General government gross debt, percent of GDP	106	112	62.7	137	251	102	121	87.6	90.1	83.1	19.9	75
Reserve currencies held by central banks, percent	2.74	20	20	20	5.82	4.97	57.4	<0.17	2.17	<0.17	<0.17	<0.17
Connectedness, scale 0–100	59	61	64	58	55	69	57	52	50	52	49	54
Innovation, scale 0–100	52.9	55.4	58.1	45.3	54.1	61	62.4	32.7	56.3	38.3	29.7	28.3
Research & development spending, percent of GDP	1.6	2.2	3.1	1.5	3.3	2.9	3.5	1.1	2.4	0.6	0.9	0.6
Critical technologies, number of top 5 positions	4	2	14	7	4	29	44	0	44	29	1	0
Unemployment rate, percent	6.2	7.3	3	7	2.5	4.3	4.1	7.2	5.1		2.6	33.7
Monetary poverty rate, percent of population	0.7	0.5	0.5	1.7		0.7	2	23.5	17	44	2	
Human development, scale 0–1	0.94	0.91	0.95	0.91	0.92	0.94	0.93	0.76	0.79	0.64	0.82	0.72
Economic inequality, scale 1–0	0.5	0.46	0.46	0.53	0.54	0.46	0.63	0.68	0.57	0.63	0.58	0.75
Gender equality, gender gap scale 0–1	0.76	0.78	0.81	0.7	0.66	0.79	0.75	0.72	0.68	0.64		0.79
Soft power, scale 0–100	64.4	67.3	69.8	62	70.6	71.8	78.8	48.8	71.2	49.8	57.7	43.7
Diplomacy, number of diplomatic missions	157	249	217	206	251	225	271	205	274	194	230	114
Humanitarian aid, percent of global spending	1.6	2	7.7	0.7	3.5	6	42.5	0	0		0	0
Share of students from abroad, percent	17.4	9.1	11.2	3.4	5.6	21.6	4.9	0.2	0.4	0.1	8.5	2.9
Number of universities in the top 200	8	5	20	3	5	25	55	1	13	0	1	1
Population, millions	39.3	66.4	84.5	59.5	124	68.7	344	211	1,423	1,438	145	63.2
Population growth rate, percent	1.22	0.17	0.35	-0.2	-0.5	0.7	0.58	0.41	-0.2	0.89	-0.3	1.32
Age dependency ratio, percent	53	62.6	58	57.1	69.9	57.8	53.9	44	44.7	47	51.8	48.4
Median age, years	40.3	41.8	45.1	47.5	49	39.8	38	33.9	39.1	28.1	39.5	28.2
Life expectancy, years	82.6	83.3	81.4	81.6	84.7	81.3	79.3	75.8	78	72	73.2	66.1
Happiness, scale 0–10	6.44	6.56	6.72	6.62	6.23	6.81	7.26	6.12	6.36	4.1	5.54	5.08

Data: Various sources, providing the latest comparable data (see endnotes). Illustration: Munich Security Conference

The same is true for other challengers today. Several indicators suggest that China and the US are playing in a different league than the other G7 and BRICS states (Figure 1.1). And while China trails the United States in nominal GDP and GDP per capita, it is already the world's largest economy in terms of purchasing power parity. Likewise, its military spending is second only to the United States', and US analysts have been watching China's military modernization efforts with increasing concern.[24] As a result of "the most dramatic military buildup since World War II,"[25] some analysts conclude that "in some areas, [China] has already matched or surpassed America."[26] While Russia is still the only nuclear superpower on a par with the US, China seems to be on track to become its second "nuclear peer."[27] According to Lind's metrics, all the other states lack either the economic or military capabilities to join the great-power ranks. While Germany and Japan can be considered latent great powers due to their economic strength, their respective grand strategies render them unlikely to make the necessary military investments to clear the great-power threshold. Despite its nuclear arsenal, Russia is "a regional power with significant national capabilities" but not a great power, either. Finally, although India's continued rise could shift the system to multipolarity in the future, it clearly remains below the threshold for now.[28] At present, India has about a third of China's defense spending and less than a quarter of its nominal GDP. And while Brazil exhibits some characteristics of a great power, South Africa falls short in almost all dimensions (Figure 1.1).

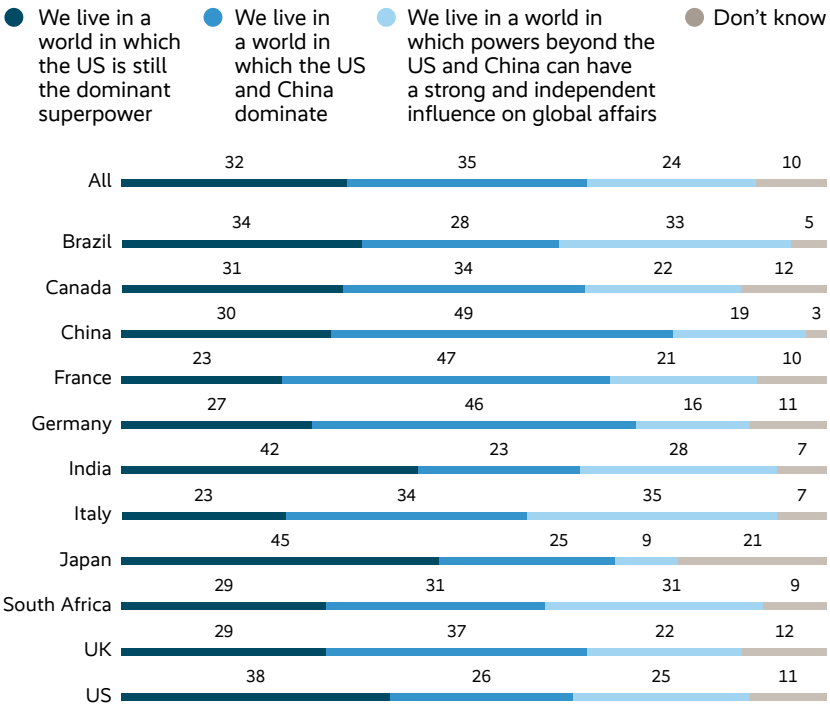
"Communist China is the most powerful adversary the United States has faced in living memory. This is no exaggeration. We sometimes forget that past enemies, including Nazi Germany and Soviet Russia, had smaller economies than we did. Each tried to take over its neighbors and hurt our country in the process. Each failed because America outbuilt and outgunned it."[23]

Marco Rubio, then–US Senator, foreword to the report "The World China Made," September 9, 2024

For another group of scholars, such rather restrictive criteria are misleading, obscuring the emergence of a multipolar world. They either accept a lower threshold for achieving great-power status or doubt that a state needs to be a great power in all dimensions to be considered a "pole." From this point of view, a multipolar world does not mean that there have to be several powers with roughly equal capabilities, "it just requires that significant power is concentrated in more than two states."[29] Based on this broader definition, states such as Brazil, France, Germany, India, Japan, or Russia can clearly be considered "important global powers."[30] Compared to most other states, the G7 and the BRICS – which, with the exception of Russia, are covered by the Munich Security Index – stand out in several dimensions, even if not in all of them.[31] Nowhere is "multipolarization" more advanced than in the economic realm, as several emerging economies have seen impressive growth. In terms of purchasing power parity, the members of the BRICS already surpassed the G7 in 2018. Following the enlargement of the bloc in 2024, which saw the addition of Egypt, Ethiopia, Iran, and the United Arab Emirates, BRICS nations account for about 40 percent of global trade and 40 percent of crude oil production and exports.[32]

Figure 1.2

Respondents' perspectives on the international order and the number of poles in it, November 2024, percent



Data: Kekst CNC, commissioned by the Munich Security Conference. Illustration: Munich Security Conference

"Europe also should not underestimate our own power. We are a great power if we act together."[33]

Kaja Kallas, EU High Representative for Foreign Affairs and Security Policy, press remarks, December 19, 2024

Others point out that the unprecedented degree of interdependence, "characterized by a global web of supply chains of a complexity and density never seen before," means that the threshold is even lower: "Any state that controls an important international resource or plays a significant international role in some domain cannot be dismissed as a bit player."[34] As a result, states that would usually not be considered "poles" can play outsized roles in world politics. For instance, Qatar, Saudi Arabia, or Turkey may not be "great powers" but are certainly power brokers in and sometimes beyond their regional environment.[35]

Finally, some scholars do not think that the world is moving toward either bi- or multipolarity. Rather, they argue that the diffusion of power means that today's club of great powers wields much less influence than those of the past. Today's great powers are less likely to form a distinct group, and their "ability to settle order questions among themselves and formalize relations of

dominance over the rest of the system is less now than in 1815, 1918, and 1948."[37] In that sense, talk of multipolarity may mask a trend toward "nonpolarity," in which the reach of the great-power club is more limited than before, as power is more widely distributed, comes in various forms, and cannot be easily translated from one domain to another.[38]

"Even a trained swimmer will not go very far upstream, regardless of the tricks or even doping they might use. The current of global politics, the mainstream, is running from the crumbling hegemonic world towards growing diversity, while the West is trying to swim against the tide."[36]

Vladimir Putin, Russian President, Valdai Discussion Club, November 7, 2024

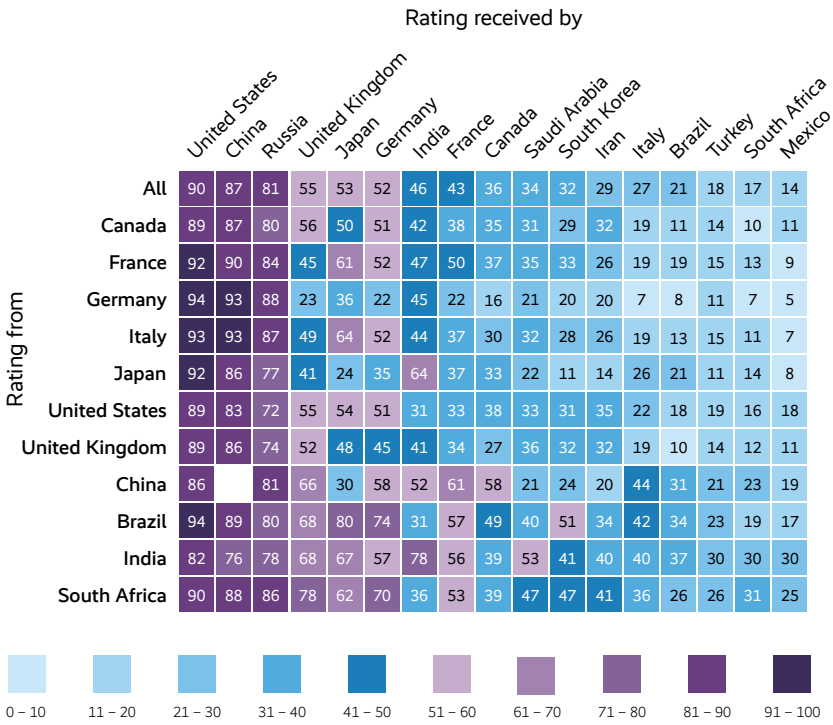
If seemingly objective criteria for assessing polarity do not provide clear-cut results, the most decisive criterion may be how many states are perceived as great powers by others.[39] While we do not have data on how political leaders assess polarity today, public perceptions mirror the different scholarly interpretations of today's order (Figure 1.2). Among the respondents in this year's Munich Security Index, about one-third think that we live in a world where the US is still the dominant superpower; another third think we live in one where the US and China dominate. About a quarter believe we live in a world where powers beyond the US and China can have a strong and independent influence on global affairs.

When asked about which countries are great powers, respondents converge on the US, China, and Russia, with an average of more than 80 percent of all respondents agreeing that these countries are great powers (Figure 1.3). While these three powers stand out, the public disagrees on the status of the others. If we are to believe the majority of respondents in the G7 and "BICS" countries (BRICS minus Russia), today's international system has between three to nine great powers: In India, the majority believes in nine great powers; the majority in Germany perceives only three.

Some striking patterns are visible: France, for instance, is considered a great power by half of its own citizens and by majorities outside of the G7 but not by majorities in other G7 countries. While in India, 78 percent of respondents see their country as a great power, the only other countries where majorities share this view are other Asian countries, i.e., China and Japan. India is only considered a great power by minorities in all non-Asian countries, including in fellow BRICS countries Brazil and South Africa. In contrast, although only 22 percent of Germans think of Germany as a great power, majorities in all other countries do so, except in Japan and the UK. A similar trend emerges for Japan: Majorities in all other countries except for China, Germany, and the UK think of it as a great power, but only about a quarter of Japanese do.

Figure 1.3

Respondents' perspectives on which countries are great powers, November 2024, share saying the respective country is a great power



Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

In sum, today's international system displays elements of unipolarity, bipolarity, multipolarity, and nonpolarity. What you see depends on where you look. The trend may point toward "multipolarization" in the sense of a shift toward a world in which more actors have become influential actors. But it is unclear whether it makes sense to speak of the "multipolarity" known from previous historical eras. At the very least, it does not tell us much if we do not consider how the various poles relate to each other and whether their interpretations of the international order converge, compete, or clash.

Ideological Polarization: Orders of Multitude?

The "multipolarization" we are witnessing also points to a trend toward ideological multipolarity. This dimension of polarity does not refer to the material distribution of power but to the relations between the poles based on the ideas they promote. Just as international systems can be polarized in terms of power, they can also be polarized ideologically.[40] Indeed, whether the emerging order will be marked by ideological unipolarity, bipolarity, multipolarity, or nonpolarity may have even more dramatic consequences for the world than polarities of power.

What the "unipolar moment" was to the distribution of power, the "liberal moment" was to the realm of ideas.[41] Following the oft-quoted "end of history," Western interpretations of democracy and market economy seemed set to conquer the world.[42] But this ideational unipolarity is gone. While liberal ideas remain attractive to people around the world, they have become increasingly contested – both from within and without.[43]

In the heartlands of the liberal international order, most liberal democracies have witnessed the rise of illiberal forces at home. In some, this backlash has amounted to an illiberal "counter-revolution."[44] To a certain degree, this domestic polarization may even be seen as the result of rising multipolarity, as considerable parts of the public in Western democracies are worried about their relative decline (Figure 1.12). According to proponents of this point of view, the liberal international order has given unfair benefits to rising powers, most notably China and the "globalist" elites at home.[45] Most importantly, the coalition supporting Donald Trump is at least partly motivated by the perception that the US is bearing the lion's share of the global burden while others are taking advantage of it (Chapter 2).

But the predominance of liberal ideas has also been challenged by the "return of authoritarian great powers,"[46] which have promoted alternative ideas and often also offered support to governments resisting liberal reforms. For the past 15 years, a "wave of autocratization" has shifted the global ideological balance of power. In 2023, 42 countries were moving towards autocracy, while only 18 countries were transitioning toward democracy. Seventy-one percent of the global population lived in autocratic countries, up from 48 percent in 2013.[47] There is no denying the fact anymore that, in most parts of the world, liberal democracy is under pressure or even in retreat.

"Russia, China, but also North Korea and Iran, are hard at work to try to weaken North America and Europe. To chip away at our freedom. They want to reshape the global order. Not to create a fairer one, but to secure their own spheres of influence."[56]

Mark Rutte, NATO Secretary General, Carnegie Europe, December 12, 2024

For some, liberal hegemony has been replaced by open competition between democracies and autocracies, with the world increasingly being divided into two geopolitical camps based on political regime type.[48] The 2022 US National Security Strategy speaks of a "contest to write the rules of the road" with China, Russia, and other states that pursue an illiberal model of international order.[49] Those convinced of a worsening clash between a liberal-democratic vision for the international order and a vision geared at "a world safe for autocracy"[50] can not just point to Putin's all-out war against Ukraine, which is entering its fourth year. They can also refer to the increasingly close cooperation between autocratic revisionists in pursuit of their global illiberal agendas. In this regard, the so-called "axis of upheaval," consisting of China, Iran, North Korea, and Russia, has attracted particular attention.[51] Russia has been aided in sustaining its war of aggression in Ukraine by drones from Iran, troops from North Korea, and, as NATO recently suggested, weapons components shipped from China.[52] From this perspective, the global responses to Russia's war of aggression have served as a catalyst for the emergence and consolidation of what some have called the "Global West" and "Global East."[53] Moreover, in various policy fields, among them human rights, global infrastructure, and development cooperation, there is a clear democracy–autocracy cleavage in the competing governance visions.[54] This development is also reflected in the pervasive democracy-autocracy fault line perceived by people in many parts of the world.[55]

Others point out that the democracy-autocracy dichotomy oversimplifies today's messy marketplace of order models. From this point of view, there are too many international dynamics that do not fit with a democracy-autocracy binary.[57] A case in point is cooperation within the framework of the BRICS, which includes both democratic and autocratic members. So, too, is the fact that many countries in the Global South – variously called the non-aligned or the "hedging middle"[58] – refuse to see the world through the prism of rigid blocs and avoid taking sides in the growing systemic competition.[59] Seeking to maximize their policy space, these countries are neither willing to adopt the Western democracy-versus-autocracy framing nor to be enlisted in a China- or Russia-led anti-Western coalition. Moreover, skeptics have reason to question whether the consolidation of geopolitical blocs will survive the rise of illiberal populists in liberal democracies, who often demonstrate close ideological affinities with autocratic foreign governments. Rather, polarization and an illiberal-nationalist backlash could undermine the idea of a cohesive West and reinvigorate debates about "Westlessness."[60] All this suggests that "a neat, two-bloc world looks unlikely."[61]

This perceived implausibility of a two-bloc world is driving the rise of the narrative of an emerging multipolar order. In ideological terms, many argue, the future order may be much messier. We may be living in a world where multiple orders co-exist or compete and where little is left of near-universal rules, principles, and patterns of cooperation. In such a "multi-order"[62] or "multiplex"[63] world, the liberal order may not necessarily disappear. But its reach will increasingly be restricted to the West, or what is left of it.[64] What is emerging, then, is a new system "characterized by plurality of power *and* identity,"[65] where several major poles pursue their own visions of order, with unique sets of rules, values, and institutions. In this world of multiple orders, Russia, which has long seen itself as a "civilizational" pole,[66] is working towards a Russian-led Eurasian order, as outlined in the new security treaties Moscow proposed to the US and NATO in late 2021. China, for its part, is establishing a Beijing-led order in East Asia and may be trying to expand it further to align with the geography of its Belt and Road Initiative.[67] This era of increasing political "diversity" may also see the emergence of other (regional) "poles" whose order models prove attractive to different degrees. But, all told, peaceful coexistence between the different orders is rather unlikely, given that it is far from clear whether the major ordering poles can agree on at least some rules, principles, and structures of cooperation to manage inter-order relations.

In sum, just as we can observe a trend toward a multipolarity of power, we can see a similar trend in ideological terms. What used to be the global standard in the post–Cold War era, namely Western political and economic liberalism, is increasingly contested again. But instead of being replaced by one clear-cut alternative, it seems to be eroding from within while simultaneously giving way to multiple contestations.

"[R]egional crises and the strong push from the Global South and BRICS Plus are making us reassess the order of a world that is no longer just multipolar but deeply fragmented."[68]

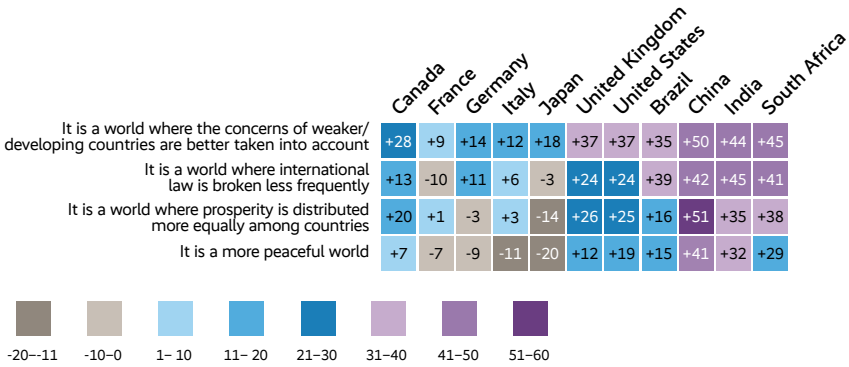
Giorgia Meloni, Italian President of the Council of Ministers, Chamber of Deputies, December 17, 2024

Promises and Perils of the Emerging Multipolar (Dis)Order

As the eight following chapters of this report demonstrate, there are clear differences between the potential "poles" (Chapters 2–9) in terms of whether politicians view a multipolar order as a cause for hope or concern. Even within countries, the changes seem to be engendering mixed feelings (Figure 7.1). This is hardly surprising, given how difficult it is to predict changes due to multipolarization. Another reason for why some societies look at a multipolar future with optimism while others look at it with dread may well be the way these societies assess the unipolar past and the liberal international order. People who feel they have not benefitted equally from this order may be much more positive about a multipolar alternative.[69] Put

Figure 1.4

Respondents' perspectives on a multipolar world, November 2024, share agreeing minus share disagreeing with each statement



Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

differently, for these people, many of whom are in the countries of the Global South, "the past was not as good as we [in the West] tend to think, and the future is not as bad as we fear."[70] In fact, when asked about the prospects for peace and prosperity, respect for international rules, and global problem-solving in a multipolar world, respondents in the "BICS" countries were, on aggregate, more optimistic than respondents in the G7 countries (Figure 1.4).

For multipolar optimists, a world where several powers keep each other in check and there are more actors able to constrain Washington should be a more peaceful and stable one.[71] Many of these optimists do not perceive Washington as "an anchor of stability, but rather a risk to be hedged against."[72] In support of their position, they need look no further than the land grabs with which Donald Trump recently threatened Canada, Greenland, and Panama.[73]

According to this optimistic reading, multipolarization may also improve multilateral cooperation. Above all, it may help bring about the long-demanded reform of international institutions, rendering global governance more representative of non-Western states and ensuring that it provides more inclusive benefits than it did during the unipolar period.[74] The inclusion of the African Union in the Group of 20 (G20) during India's G20 presidency may be a case in point. Optimists also believe that emerging powers can be expected to contribute to the provision of global public goods and constructively support conflict prevention or crisis diplomacy. They see the increasing number of global actors actively engaging in crisis diplomacy as a positive sign and are

encouraged by the fact that countries such as Brazil are suggesting solutions to crises on other continents. As the optimists see it, the more centers of power, the more shoulders to bear the burden of global leadership. From this perspective, a multipolar order may even be attractive to a former hegemon tired of acting as the world's policeman and supplier of global public goods.

Moreover, some hope that the move from US-led unipolarity to multipolarity will strengthen international law by reducing Western states' ability to selectively apply the rules and principles of the order.[76] For those who subscribe to this view, multipolarity should constrain "hegemonic power, which, unrestrained, represents a threat to international rules and norms."[77]

Last but not least, the optimistic reading expects a multipolar order to exhibit greater tolerance towards the world's cultural and political diversity. The celebration of "massive diversity,"[78] which is especially prevalent in Chinese and Russian accounts of multipolarity, chimes well with postcolonial instincts directed against Western ideas in many parts of the world.[79]

For those with a less optimistic reading, a multipolar order promises to be "a recipe for chaos."[80] Perhaps most importantly, there are good reasons to believe that the two aspects of "multipolarization" – the rise of new centers of power and the growing ideological polarization of the international system – will increase the risk of great-power war.[81] Rather than leading to a stable balance of power, the rise of new and ideologically diverse power centers may trigger new arms races, both nuclear and conventional, with the potential for crises and escalation.[82] While the world's leading powers have not fought a major war against each other for almost 80 years – a remarkable but exceptional period in world history – scholars warn that too many people are taking this achievement for granted.[83]

Moreover, even if the great powers manage to avoid war between them, increasing competition does not bode well for conflicts in other parts of the world. Rising great-power tensions have already made it more difficult to agree on and fund peacekeeping operations, let alone peace enforcement ones. Recent examples include China's and Russia's opposition to a new peacekeeping mission to Haiti and Russia's decision to block a resolution calling for a ceasefire and humanitarian access in Sudan.[85] For some, "peacekeeping is becoming yet another casualty of today's messy, multipolar world."[86] This is even more worrisome, as the world is currently experiencing a record number of armed conflicts.[87] Researchers are observing an increasing internationalization of

"An equal and orderly multipolar world means every country can find its place in a multipolar system and play its due role pursuant to international law, so that the process of multipolarization is stable and constructive on the whole."[75]

Xi Jinping, Chinese President, conference marking the 70th anniversary of the Five Principles of Peaceful Coexistence, June 28, 2024

"What is most worrying now is that literally any scenario is possible. We have not had a situation like this since 1945. I know it sounds devastating, especially to people of the younger generation, but we have to mentally get used to a new era. We are in a prewar era."[84]

Donald Tusk, Polish Prime Minister, interview, March 29, 2024

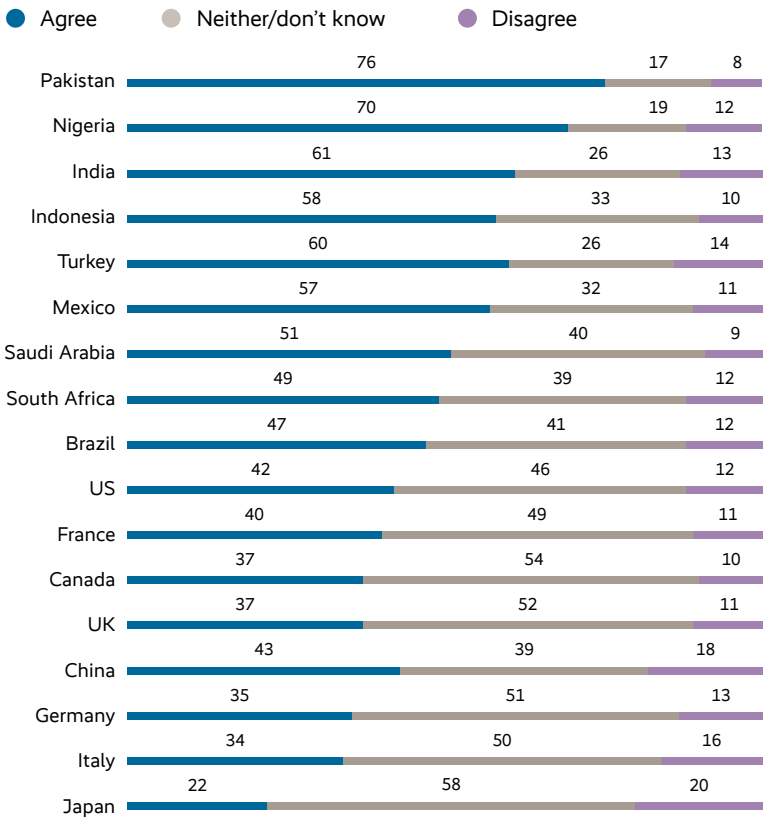
internal conflicts, a trend that is reportedly "driven by heightened great-power competition and the more assertive foreign-policy stances of many emerging powers, set against a backdrop of increasing geopolitical fragmentation."[88] There are now more powers engaged in crisis diplomacy than ever before, with a number of new actors entering the scene, but their joint rate of success is underwhelming, as too often they work against each other.

The problem goes beyond issues of war and peace. Without global leadership of the kind provided by the United States for the past several decades, it is hard to imagine the international community providing global public goods like freedom of navigation or tackling even some of the many grave threats confronting humanity. Skeptics argue that the multipolarized world faces a massive "global leadership deficit,"[89] as many countries possess negative power – being able to block or disrupt collective decision-making – but positive power is in short supply.[90] Rather than being "a way to fix multilateralism,"[91] as suggested by UN Secretary-General Antonio Guterres, multipolarity may be accelerating its erosion. The signals from Washington increasingly indicate that the US no longer wants to be the guardian of the liberal international order, but it is far from clear which other countries may be willing and able to provide much-needed global public goods. Freedom of navigation is just one example. Reports suggest that when the Houthi attacks disrupted vital shipping routes in the Red Sea, Beijing pushed Tehran to rein in the Houthis – not for the sake of safe international shipping but solely to ensure the safe passage of Chinese ships.[92] From the perspective of the multipolar pessimists, we might soon end up in a world where all actors tend to their own short-term self-interests to the detriment of long-term multilateral cooperation. The widespread preference for bilateral deals rather than inclusive multilateral cooperation revealed in the Munich Security Index 2025 (Figure 1.5) suggests that the type of cooperation needed to address the world's most pressing problems is increasingly hard to obtain.

Furthermore, a multipolar world may also undermine universal rules and norms. As the former EU High Representative for Foreign Affairs and Security Policy Josep Borrell has argued, "when the number of participants in a game increases, the natural response should be to strengthen the rules governing the game."[93] But rather than strengthening international law, multipolarization may well move us away from an order that does have standards, even if they are sometimes implemented inconsistently, and towards an order without any standards at all.[94] Evidence of this can be found in the revisionist approach to international rules adopted by some of the new poles of influence and the lack of pushback against this norm contestation from others. Moreover,

Figure 1.5

Respondents' views on different types of cooperation, July/November 2024, percent



Thinking about world politics, do you agree or disagree? In the future, my country should prioritize bilateral relations with other countries rather than invest in multilateral initiatives and international organizations.

The data for Indonesia, Mexico, Nigeria, Pakistan, Saudia Arabia, and Turkey is from July 2024. The data for the G7 and "BICS" countries is from November 2024.

Data: Kekst CNC, commissioned by the Munich Security Conference. Illustration: Munich Security Conference

the presence of more great powers may mean even more actors claiming special rights for themselves – or different legal systems shaped by the respective regional hegemons. Under the guise of promoting multipolarity, China and Russia increasingly seem to be seeking to "partition the world into spheres of regional unipolarity."[95]

Last but not least, while multipolarity may well bring greater respect for cultural diversity, it may simultaneously be accompanied by efforts to curb universal norms meant to constrain governments' behavior and protect the individual. Legal scholars have already warned about an emerging

"authoritarian international law."[96] If the pessimists are right, the "age of impunity,"[97] in which human rights violations and other crimes go too often unpunished, is here to stay.

Managing Multipolarization: Toward Depolarization?

Recent trends suggest that the negative effects of greater multipolarity are prevailing as divides between major powers grow. For instance, global defense spending has hit a new record, and new arms races are looming.[98] At the same time, in Gaza, Sudan, and Ukraine, among others, attempts at conflict resolution are failing or have not even begun; and a confrontational climate summit in Azerbaijan is just one of many examples of increasingly deficient global problem-solving. Before our eyes, we are seeing the negative scenario of a more multipolar world materialize – a more conflictual world without shared rules and effective multilateral cooperation. Rather than generating more inclusive global benefits, it comes with fragmentation that is shrinking the proverbial global pie, potentially triggering "lose-lose" dynamics where everyone will be worse off in the long run.[99]

It is far from clear what might initiate the process of "depolarization" that could set multipolarity on a positive track. Some believe that international organizational reform is key. This reasoning suggests that the divisions accompanying greater multipolarity could be mitigated if global governance structures became more inclusive of the new power centers by encouraging, as German Chancellor Olaf Scholz put it, their "greater participation in and integration into the international order [...] to keep multilateralism alive in a multipolar world."[101] Yet the suggestion that the integration of new poles alone will breed the type of consensus needed to create an order that works for the benefit of all is far from a foregone conclusion. Doubters need only look to the five major powers with permanent seats on the UN Security Council and their inability to agree on solutions to any of the major conflicts of today.

Reforms that mostly reflect changes in material power may thus not be sufficient. As some have suggested, ideological reforms of the international order may be needed to create a new working consensus among the major powers that also benefits the wider world. Put differently, they argue that for multipolarity to work, we might have to rethink some of the order's rules and norms.[102] This, however, begs the question of which rules must be preserved under any circumstances, which rules are particularly contested, and which principles could and might have to be adjusted.

"In times of increasing polarization, expressions such as 'deglobalization' have become commonplace. But it is impossible to 'deplanetize' our life in common. We are condemned to the interdependence of climate change."[100]

Luiz Inácio Lula da Silva, Brazilian President, UN General Assembly, September 24, 2024

Some liberal rules that have circumscribed national sovereignty or prescribed neoliberal economic practices have become a particular bone of contention.[103] Some believe that scaling them back – at least in their more intrusive variants – will hardly be avoidable. This is not just because of pushback from the world's growing number of autocrats, but also because of a widespread "mood of cultural decolonization" that emphasizes sovereignty over the spread of liberal ideas.[104] Even governments that have long engaged in promoting democracy and accountability for human rights abuses seem to have stopped believing in the universal applicability of these ideas.[105]

Meanwhile, the discourse of leaders from the Global South on international rules is often difficult to interpret. It is unclear whether they are demanding greater consistency in applying existing international rules or calling for new principles and rules.[106] While leaders' language is often vague in this regard, people in many parts of the world still see merit in existing international rules: In all countries surveyed for the Munich Security Conference in July 2024, absolute majorities think that the current international rules and principles represent the values and needs of most countries.[107] And there is good reason to believe that the rules and principles laid down in the UN Charter and the Universal Declaration of Human Rights still have merit in a multipolar world. After all, they were drafted to prevent the type of fragmentation that resulted in two world wars and the associated atrocities. While Russia and some like-minded states tried to block an agreement at the Summit of the Future,[108] the fact that UN members eventually agreed on a meaningful document is clear evidence of a widespread commitment to rules-based multilateralism in the framework of the UN.[109]

Any effort to reform the existing order in a way that reflects greater multipolarity but still serves the international community at large will depend on the major powers defining their own interests broadly and with a view to the long term – in a way that could also be called "enlightened." Yet few of the old and new powers are doing so. And some of those who still define their interests more broadly, among them European states and Japan, are desperately clinging to the hope that the status quo can be maintained. As such, they risk becoming "the defenders of last resort for the world of yesterday."[110] And while the US might once have felt "a special responsibility to shape a liberal order that benefits the wider world," critics fear that, under President Trump's leadership, it might behave "in the same narrowly self-interested, frequently exploitive way as many great powers throughout history."[111] Russia's foreign policy, which is primarily aimed at disruption,

"We are moving to a multipolar world, but we are not there yet. We are in a purgatory of polarity. And in this purgatory, more and more countries are filling the spaces of geopolitical divides, doing whatever they want with no accountability."[115]

António Guterres,
UN Secretary-General,
UN General Assembly,
September 24, 2024

is the opposite of enlightened. Indeed, Moscow's talk of "indivisible security" only serves as a smoke screen for its pursuit of a Russian sphere of influence.[112] And although China would clearly like its vision for the international order – with its concepts of common security and common development that resonate in some parts of the world – to be perceived as seeking the common good, the order it pursues, just like Russia, is one of major power privilege and not of sovereign equality.[113] Finally, major actors in the Global South seem less focused on averting the growing polarization of global politics and more on adapting to or exploiting it. The bridge-building between the Global North and the Global South that some of these states have officially committed themselves to would be a highly welcome remedy for polarization. But in many of these countries, the dominant approach in an increasingly fragmented global environment is to assert narrow interests, which often means glossing over the fact that smaller states do not have this opportunity.[114]

What makes things worse is that, almost everywhere, the pursuit of enlightened foreign policies is being hampered by growing domestic polarization and the shrinking political leeway that accompanies it. Domestic polarization, in short, is playing a major role in preventing leaders from building the necessary global consensus. Worse yet, leaders may even have incentives to frustrate international agreement – simply because they "thrive [...] in a Hobbesian, transactional, all-against-all world."[116] Put differently, polarization on the international level may help some leaders consolidate power at home. Global efforts to reduce dangerous divides between countries, preserve basic rules and norms, or create new ones, and efforts to coordinate responses to a wide range of global threats will thus not succeed if depolarization cannot be accomplished within countries. The quest to build a more peaceful, sustainable, and just order starts at home.

Key Points

1. Although it is unclear whether we are already living in a truly multipolar system, today's world is characterized by "multipolarization."

2. While the world today displays elements of uni-, bi-, multi-, or even nonpolarity, it is clearly being shaped by a changing global distribution of power, with a larger number of actors having the ability to influence key global issues. But the world is also experiencing increasing polarization, both at the international level and within many countries' domestic politics.

3. For many politicians and citizens around the globe, a more multipolar world holds significant promise. But increasing competition among the various "poles" and their order models is already impeding joint approaches to global crises and threats.

4. As few states still pursue foreign policies focused on the common good – and domestic divides are further complicating such attempts – it is far from clear how a process of depolarization that could set multipolarity on a positive track could be initiated.

Quotations originally in British English have been adapted to American English. In some cases, stylistic adjustments were made to quotes.

Endnotes

1 Introduction: Multipolarization

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1. For instance, Germany's first National Security Strategy, published in 2023, notes: "We are living in an era that is increasingly multipolar and marked by rising systemic rivalry." See The Federal Government, "Robust. Resilient. Sustainable: Integrated Security for Germany," Berlin, 2023, https://perma.cc/BW4U-K8PE, 23.
2. See, for instance, then-EU High Representative for Foreign Affairs and Security Policy Josep Borrell: "Over the last three decades, we have seen a rapid transformation in the distribution of power around the world. We went from a bipolar configuration between 1945 and 1989 to a unipolar configuration between 1989 and 2008, before entering in what we today could call 'complex multipolarity.'" Josep Borrell, "Multipolarity Without Multilateralism," Brussels: European External Action Service, September 24, 2023, https://perma.cc/Y9FU-KGPA.
3. Jo I. Bekkevold, "No, the World Is Not Multipolar," *Foreign Policy*, September 22, 2023.
4. Ministry of External Affairs of the Government of India, "Remarks by External Affairs Minister, Dr. S. Jaishankar at the BRICS Outreach Session in Kazan," New Delhi: Ministry of External Affairs of the Government of India, October 24, 2024, https://www.mea.gov.in/Speeches-Statements.htm?dtl/38461/Remarks_by_External_Affairs_Minister_Dr_S_Jaishankar_at_the_BRICS_Outreach_Session_in_Kazan.
5. For an overview of various definitions of "polarity" and a summary of the literature, see Goedele de Keersmaeker, *Polarity, Balance of Power and International Relations Theory: Post-Cold War and the 19th Century Compared*, Cham: Palgrave Macmillan, 2016, as well as Nina Græger et al. (eds.), *Polarity in International Relations: Past, Present, Future*, Cham: Palgrave Macmillan, 2022.
6. For a discussion of the literature, see Keersmaeker, *Polarity, Balance of Power and International Relations Theory*, 30–34. A key point of contention relates to the question of whether a state needs to excel in all crucial sectors to be considered a great power or whether it is sufficient to be strong in some. In a classic formulation, Kenneth Waltz maintained: "The economic, military, and other capabilities of nations cannot be sectored and separately weighed. States are not placed in the top rank because they excel in one way or another. Their rank depends on how they score on all of the following items: size of population and territory, resource endowment, economic capability, military strength, political stability and competence." See Kenneth N. Waltz, *Theory of International Politics*, Boston: McGraw-Hill, 1979, 131.
7. "To Paris, U.S. Looks Like a Hyperpower," *International Herald Tribune*, February 5, 1999.
8. Stephen G. Brooks and William C. Wohlforth, "The Myth of Multipolarity: American Power's Staying Power," *Foreign Affairs* 102:3 (2023), 76–91, 78. Also see Michael Beckley, *Unrivaled: Why America Will Remain the World's Sole Superpower*, Ithaca: Cornell University Press, 2018; Stephen G. Brooks and William C. Wohlforth, "The Once and Future Superpower: Why China Won't Overtake the United States," *Foreign Affairs*, April 13, 2016.
9. SIPRI estimates are higher than official Chinese figures, but do not inflate the Chinese budget as some other recent estimates have done. For an overview of the debate on assessing Chinese military spending, see M. Taylor Fravel, George J. Gilboy, and Eric Heginbotham, "Estimating China's Defense Spending: How to Get It Wrong (and Right)," *Texas National Security Review* 7:3 (2024), 40–54, https://doi.org/10.26153/tsw/54043. Similar to SIPRI, the authors estimate that Chinese defense spending amounts to around 36 percent of comparable US defense spending in 2024.
10. For a recent overview of the overseas bases, see Congressional Research Service, "U.S. Overseas Basing: Background and Issues for Congress," Washington, DC: Congressional Research Service, July 10, 2024, https://perma.cc/W2BW-348K.
11. Andrea Gilli and Mauro Gilli, "Why China Has Not Caught Up Yet: Military-Technological Superiority and the Limits of Imitation, Reverse Engineering, and Cyber Espionage," *International Security* 43:3 (2019), 141–189, https://doi:10.1162/ISEC_a_00337.
12. Felix Gerding and Jonathan S. Hartley, "De-Dollarization? Not So Fast," *Economic Letters* 238 (2024), https://doi.org/10.1016/j.econlet.2024.111665.
13. Although its dominance has decreased, 57 percent of the allocated reserves are in US dollars, while only 20 percent are in euros, almost 6 percent in Japanese yen, and close to 5 percent in pounds sterling – all currencies of US allies. The Chinese renminbi accounts for just a little more than 2 percent. See International Monetary Fund, "Currency Composition of Official Foreign Exchange Reserves (COFER)," Washington, DC: International Monetary Fund, December 20, 2024, https://perma.cc/45FL-A7GT.
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15. Pål Røren, "Unipolarity Is Not Over Yet," *Global Studies Quarterly* 4:2 (2024), https://doi.org/10.1093/isagsq/ksae018, 2.
16. For instance, Germany's first National Security Strategy, published in 2023, notes: "We are living in an era that is increasingly multipolar and marked by rising systemic rivalry." See The Federal Government, "Robust. Resilient. Sustainable: Integrated Security for Germany," Berlin, 2023, https://perma.cc/BW4U-K8PE, 23.
17. See, for instance, then-EU High Representative for Foreign Affairs and Security Policy Josep Borrell: "Over the last three decades, we have seen a rapid transformation in the distribution of power around the world. We went from a bipolar configuration between 1945 and 1989 to a unipolar configuration between 1989 and 2008, before entering in what we today could call 'complex multipolarity.'" Josep Borrell, "Multipolarity Without Multilateralism," Brussels: European External Action Service, September 24, 2023, https://perma.cc/Y9FU-KGPA.
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21. For a discussion of the literature, see Keersmaeker, *Polarity, Balance of Power and International Relations Theory*, 30–34. A key point of contention relates to the question of whether a state needs to excel in all crucial sectors to be considered a great power or whether it is sufficient to be strong in some. In a classic formulation, Kenneth Waltz maintained: "The economic, military, and other capabilities of nations cannot be sectored and separately weighed. States are not placed in the top rank because they excel in one way or another. Their rank depends on how they score on all of the following items: size of population and territory, resource endowment, economic capability, military strength, political stability and competence." See Kenneth N. Waltz, *Theory of International Politics*, Boston: McGraw-Hill, 1979, 131.
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24. SIPRI estimates are higher than official Chinese figures, but do not inflate the Chinese budget as some other recent estimates have done. For an overview of the debate on assessing Chinese military spending, see M. Taylor Fravel, George J. Gilboy, and Eric Heginbotham, "Estimating China's Defense Spending: How to Get It Wrong (and Right)," *Texas National Security Review* 7:3 (2024), 40–54, https://doi.org/10.26153/tsw/54043. Similar to SIPRI, the authors estimate that Chinese defense spending amounts to around 36 percent of comparable US defense spending in 2024.
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40. Andrew Erickson, "What the Pentagon's New Report on Chinese Military Power Reveals About Capabilities, Context, and Consequences," *War on the Rocks*, December 19, 2024.
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42. Brad Roberts et al., "China's Emergence as a Second Nuclear Peer: Implications for U.S. Nuclear Deterrence Strategy," Livermore: Center for Global Security Research, Spring 2023, https://perma.cc/5UL5-GATX.
43. Lind, "Back to Bipolarity," 50–54.
44. Emma Ashford and Evan Cooper, "Yes, the World Is Multipolar," *Foreign Policy*, October 5, 2023.
45. Ashford and Cooper, "Yes, the World Is Multipolar."
46. The setup of the MSI mirrors the widespread perception that the world is becoming more multipolar.
47. Stewart Patrick, "BRICS Expansion, the G20, and the Future of World Order," Washington, DC: Carnegie Endowment for International Peace, October 9, 2024, https://perma.cc/38LZ-9PJ2. Indonesia joined the bloc in 2025.
48. Kaja Kallas, "European Council: Press Remarks by High Representative Kaja Kallas Upon Arrival," Brussels: European Union External Action, December 19, 2024, https://perma.cc/52G2-ZUYD.

49. Bilahari Kausikan, "Polarity Is What States Make of It," *Foreign Affairs* 102:6 (2023), 166–168, 167.

50. Kausikan mentions his native Singapore – "as a financial center, a port in global trade, and a critical hub for oil refining" – as well as larger states "such as Australia, India, Japan, Saudi Arabia, and South Korea." See Kausikan, "Polarity Is What States Make of It," 167.

51. Vladimir Putin, "Valdai Discussion Club Meeting," Sochi: Valdai Discussion Club, November 7, 2024, http://en.kremlin.ru/events/president/transcripts/statements/75521.

52. William C. Wohlforth, "Polarity and International Order: Past and Future," in: Græger et al. (eds.), *Polarity in International Relations*, 418–9

53. Randall Schweller, "An Emerging World That Defies Historical Analogy," in: Græger et al. (eds.), *Polarity in International Relations*.

54. For a definition of "polarity" that emphasizes the perception of status, see Benjamin Zala, "Polarity Analysis and Collective Perceptions of Power: The Need for a New Approach," *Journal of Global Security Studies* 2:1 (2017), 2–17, https://doi:10.1093/jogss/ogw025.

55. Frank Whelon Wayman introduced the notions of "power polarity" and "cluster polarity" to distinguish between two dimensions of polarization, power concentration and coalition configuration, which have to be assessed individually. For instance, a system can be shaped by power polarity and cluster multipolarity at the same time. See Frank Whelon Wayman, "Bipolarity and War: The Role of Capability Concentration and Alliance Patterns Among Major Powers, 1816-1965," *Journal of Peace Research* 21:1 (1984), 61–78. For a contemporary discussion and application, see Keersmaeker, *Polarity, Balance of Power and International Relations Theory*, 19–24. Forsby argues that the "overall security relations in the system [are] shaped not only by the relative distribution of power, but also [by] the relative distribution of mutually incompatible systemic identities." See Andreas B. Forsby, "The Nexus of Systemic Power and Identity: Structural Variations of the US-China Great Power Rivalry," in: Græger et al. (eds.), *Polarity in International Relations*, 232.

56. Charles Krauthammer, "The Unipolar Moment," *Foreign Affairs* 70:1 (1990), 23–33. Previous Munich Security Reports have dealt with the liberal moment and its demise in more detail. See, for instance, Tobias Bunde et al., "Munich Security Report 2020: Westlessness," Munich: Munich Security Conference, February 2020, https://doi.org/10.47342/IAQX5691. Arguably, power unipolarity corroborated ideological unipolarity – and the other way around.

57. Francis Fukuyama, "The End of History?," *The National Interest* 16 (1989), 3–18.

58. There is a vast literature on the crisis of the liberal international order and the contestation of the so-called "liberal script." See, for example, G. John Ikenberry, "The End of Liberal International Order?," *International Affairs* 94:1 (2018), 7–23, https://doi.org/10.1093/ia/iix241; Tanja A. Börzel, Johannes Gerschewski, and Michael Zürn (eds.), *The Liberal Script at the Beginning of the 21st Century: Conceptions, Components, and Tensions*, Oxford: Oxford University Press, 2024, https://doi.org/10.1093/oso/9780198924241.001.0001.

59. See, for example, Jan Zielonka, *Counter-Revolution: Liberal Europe in Retreat*, Oxford: Oxford University Press, 2018.

60. See Jeff D. Colgan and Robert O. Keohane, "The Liberal Order Is Rigged: Fix It Now or Watch It Wither," *Foreign Affairs* 96:3 (2017), 42–44.

61. Azar Gat, "The Return of Authoritarian Great Powers," *Foreign Affairs* 86:4 (2007), 59–69.

62. Marina Nord et al., "Democracy Report 2024: Democracy Winning and Losing at the Ballot," Gothenburg, March 2024, https://perma.cc/WR7A-7YBV.

63. For some, this follows a historical pattern. See, for instance, Matthew Kroenig, *The Return of Great Power Rivalry: Democracy Versus Autocracy From the Ancient World to the U.S. and China*, Oxford: Oxford University Press, 2020, https://doi.org/10.1093/oso/9780190080242.001.0001.

64. The White House, "National Security Strategy."

65. Jessica Chen Weiss, "A World Safe for Autocracy? China's Rise and the Future of Global Politics," Foreign Affairs, June 11, 2019.

66. Andrea Kendall-Taylor and Richard Fontaine, "The Axis of Upheaval," *Foreign Affairs* 103:3 (2024), 50–63.

67. David A. Sanger, "For First Time, NATO Accuses China of Supplying Russia's Attacks on Ukraine," *New York Times*, July 7, 2024; Hal Brands, "The Looming Eurasian Menace," *The Washington Post*, January 1, 2025.

68. For the concept of the "Global West," see Gideon Rachman, "Xi Jinping's China and the Rise of the 'Global West'," *Financial Times*, October 24, 2022. For the "three worlds," see G. John Ikenberry, "Three Worlds: the West, East and South and the Competition to Shape Global Order," *International Affairs* 100:1 (2024), 121–138, https://doi.org/10.1093/ia/iiad284. As previous data from the Munich Security Index has shown, Russia's war of aggression has indeed triggered a convergence in public opinion among the G7 countries. See Tobias Bunde and Sophie Eisentraut, "Zeitenwende for the G7: Insights From the Munich Security Index Special G7 Edition," Munich: Munich Security Conference, Munich Security Brief 3, June 2022, https://doi.org/10.47342/JDIE4364.

69. Tobias Bunde et al., "Munich Security Report 2023: Re:vision," Munich: Munich Security Conference, February 2023, https://doi .org/10.47342/ZBJA9198.

70. When asked about the main divide in global politics today, those surveyed for the Munich Security Index 2023 most prominently mentioned that between democracies and dictatorships. See Tobias Bunde and Sophie Eisentraut, "Introduction: Re:vision," in: Bunde et al., "Munich Security Report 2023: Re-vision," 14–37.

71. Mark Rutte, "'To Prevent War, NATO Must Spend More': Speech by NATO Secretary General Mark Rutte at the Concert Noble, Brussels," Brussels: Carnegie Europe, December 12, 2024, https://www.nato.int/cps/en/natohq/opinions_231348.htm.

72. They are described in Bunde et al., "Munich Security Report 2023."

73. Michael J. Mazarr et al., "Understanding Influence in the Strategic Competition With China," Washington, DC: RAND, June 30, 2021, https://perma.cc/5JSX-3YM2.

74. Tobias Bunde and Sophie Eisentraut, "Introduction: Re:vision," in *Munich Security Report 2023*. Also see Ikenberry, "Three Worlds: the West, East and South and the Competition to Shape Global Order."

75. Bunde et al., "Munich Security Report 2020."

76. Charles A. Kupchan, "A U.S. Strategy of Judicious Retrenchment," in: Græger et al. (eds.), *Polarity in International Relations*, 369.

77. Trine Flockhart, "The Coming Multi-Order World," *Contemporary Security Policy* 37:1 (2016), 3–30, https://doi.org/10.1080/13523260.2016.1150053.

78. Amitav Acharya, "After Liberal Hegemony: The Advent of a Multiplex World Order," *Ethics & International Affairs* 31:3 (2017), 271–285, https://doi.org/10.1017/S089267941700020X.
79. Flockhart, "The Coming Multi-Order World."
80. Flockhart, "The Coming Multi-Order World," emphasis added. Acharya speaks of the "cultural, ideological and political diversity" that characterizes the new order. See Amitav Acharya, "What is a Multiplex World Order?," *International Affairs Blog*, February 6, 2024.
81. Bobo Lo argues that in the worldview shared by Putin and the Russian elite "Russia is not only a great power but also one of the principal centers of global civilization." See Bobo Lo, "Between Aspiration and Reality: Russia in the World (Dis)order," Paris: Institut Français des Relations Internationales, Russie.Eurasie. Visions 134, June 2024, https://perma.cc/E74P-PUUC.
82. Trine Flockhart and Elena A. Korosteleva, "War in Ukraine: Putin and the Multi-Order World," *Contemporary Security Policy* 43:3 (2022), 466–481, https://doi.org/10.1080/13523260.2022.2091591. Flockhart and Korosteleva argue that while the orders that emerge will likely be closely aligned with regional centers of power and their respective spheres of influence, these orders may not necessarily be tied to geography, as an Islamic-led, nongeographic "Sharia order" is equally conceivable.
83. Giorgia Meloni, "President Meloni's Address to the Chamber of Deputies Ahead of the European Council Meeting on 19 December," Rome: Italian Government, December 17, 2024, https://perma.cc/S5LE-J6GX.
84. For more on perceptions that the existing order has not delivered on its promise to grow the pie for the benefit of all, see Tobias Bunde and Sophie Eisentraut, "Introduction: Lose-Lose?", in: Tobias Bunde, Sophie Eisentraut, and Leonard Schütte (eds.), *Munich Security Report 2024: Lose-Lose?*, Munich: Munich Security Conference, February 2024, https://doi.org/10.47342/BMQK9457, 13–25.
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89. Bunde, Eisentraut, and Schütte, *Munich Security Report 2024*.
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91. Sophie Eisentraut, "Standard Deviation: Views on Western Double Standards and the Value of International Rules," Munich: Munich Security Conference, Munich Security Brief 1, September 2024, https://doi.org/10.47342/LDPB2956, 13.
92. Gabuev and Stuenkel, "The Battle for the BRICS."
93. Shaun Breslin, *China Risen? Studying Chinese Global Power,* Bristol: Bristol University Press, 2021, 192.
94. Mark Leonard and Ivan Krastev, "Culture," in: *The Power Atlas: Seven Battlegrounds of a Networked World*. Berlin: ECFR; Stiftung Mercator, December 2021, 148–71, https://perma.cc/9GCY-VMMS.
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