

# Executive Summary

It has become a truism of foreign policy debates that the world is becoming ever more “multipolar.” While the extent to which today’s world is already multipolar is debatable, the world’s “multipolarization” is a fact: On the one hand, power is shifting toward a larger number of actors who have the ability to influence key global issues. On the other hand, the world is experiencing increasing polarization both between and within many states, which is hampering joint approaches to global crises and threats.

Today’s international system shows elements of unipolarity, bipolarity, multipolarity, and nonpolarity. Yet an ongoing power shift toward a greater number of states vying for influence is clearly discernible. And multipolarization is not only evident in the diffusion of material power but also in the fact that the world has become more polarized ideologically. Political and economic liberalism, which shaped the unipolar post–Cold War period, is no longer the only game in town. It is increasingly contested from within, as demonstrated by the rise of nationalist populism in many liberal democracies. But it is also challenged from without, as evidenced in a growing ideological bifurcation between democracies and autocracies, as well as in the emergence of a world, in which multiple order models co-exist, compete, or clash.

Across the world, this multipolarization engenders mixed feelings. The optimistic reading highlights opportunities for more inclusive global governance and greater constraints on Washington, long seen as too dominant a power by many. In the pessimistic reading, multipolarization increases the risk of disorder and conflict and undermines effective cooperation. While the Munich Security Index 2025 suggests that in aggregate, people in the G7 countries are less optimistic about a more multipolar world than respondents in the “BICS” countries (BRICS minus Russia), national views on multipolarity are shaped by distinct perspectives on the current international order and a desirable future one.

Donald Trump’s presidential victory has buried the US post–Cold War foreign policy consensus that a grand strategy of liberal internationalism would best serve US interests ([Chapter 2](#)). For Trump and many of his supporters, the US-created international order constitutes a bad deal. As a consequence, the US may be abdicating its historic role as Europe’s security guarantor – with significant consequences for Ukraine. US foreign policy in the coming years

will likely be shaped by Washington's bipolar contest with Beijing. This, however, may well accelerate the multipolarization of the international system.

China is the world's most prominent and powerful proponent of a multipolar order, portraying itself as an advocate for countries of the so-called Global South ([Chapter 3](#)). Yet many in the West see Beijing's advocacy for multipolarity as a rhetorical cover for pursuing great-power competition with the US. Despite China's considerable success in rallying the discontents of the current global order, the country's economic and military progress faces a series of homegrown obstacles. Moreover, under President Trump, US efforts to hamstring China will likely intensify – but Beijing could also benefit from US withdrawal from international commitments or Washington's alienation of long-standing partners.

For the EU, which embodies the liberal international order, the growing contestation of core elements of the order poses a particularly grave challenge ([Chapter 4](#)). Russia's war against Ukraine and the rise of nationalist populism in many European societies, among others, are putting key elements of the EU's liberal vision in jeopardy. Donald Trump's re-election could intensify these challenges and revive the debate about whether the EU needs to become an autonomous pole in international politics. But it may also embolden populist movements that deepen Europe's internal divisions and undermine the EU's capacity to address the crises it confronts.

In this century, no state has made greater efforts to upend the international order than Russia. Moscow envisions a multipolar world order made up of “civilizational states,” as Russia perceives itself ([Chapter 5](#)). Smaller countries – for Russia, Ukraine counts as such – fall within a civilizational state's sphere of influence. Despite discrepancies between Moscow's self-image and its actual power base, Russia is successfully disrupting efforts to stabilize the international order. At the same time, it faces increasing economic problems and the consequences of imperial overstretch. Whether the country can implement its vision of multipolar spheres of influence will depend on the pushback of others.

Indian leaders' criticism of the existing international order and their embrace of the notion of multipolarity is inseparably linked to India's quest for a place among the world's leading powers ([Chapter 6](#)). While New Delhi has been making strides in raising India's international profile, it also faces challenges. Externally, China is growing its strategic footprint among India's neighbors. Domestically, India's economy suffers from structural weaknesses and the nation's political and cultural pluralism are in decline. And while New Delhi has positioned itself as a voice of the Global South, its policy of multi-alignment raises doubts whether

India is willing to take on a more prominent role in global peace-making efforts.

Japan is a quintessential status quo power ([Chapter 7](#)). Deeply invested in liberal internationalism and US primacy, it is especially perturbed by the end of the unipolar moment, the rise of China, and the prospect of a new multipolar order. Among those surveyed for the Munich Security Index 2025, Japanese respondents are the most concerned about the world becoming more multipolar. However, Tokyo has also been preparing longer than most for these geopolitical changes. Moreover, a raft of recent measures indicates Japan's willingness to defend itself and the order it values.

Brazilian leaders view the emergence of a multipolar order as an opportunity to reform outdated power structures and give countries of the Global South a stronger voice ([Chapter 8](#)). For this reason, Brazil put global governance reform at the top of the agenda for its G20 presidency last year, along with other priorities of the Global South such as poverty reduction and food security. With its significant natural resources, Brazil has the potential to further grow its global clout, shaping global debates on food, climate, and energy security. Yet Brazil's traditional non-alignment strategy may well become more difficult to uphold amid rising geopolitical tensions and a second Trump term.

South Africa's embrace of the notion of multipolarity cannot be separated from its criticism of the existing international order, especially of unrepresentative international institutions ([Chapter 9](#)). Pretoria also regularly criticizes Western states for applying international law selectively. South Africa has long been perceived as Africa's "natural leader" and an international moral exemplar. But as anti-Westernism has risen in the country and South Africa's record of promoting human rights and international law has deteriorated, the country's international stature has also taken a hit.

Visions of multipolarity are thus also polarized. This makes it increasingly difficult to adapt the existing order peacefully, avoid new arms races, prevent violent conflicts within and among states, allow for more inclusive economic growth, and jointly address shared threats like climate change, which respondents to the Munich Security Index have consistently rated highly. As the great and not-so-great powers cannot tackle these challenges alone, their cooperation will be crucial. That many in the international community still value rules-based multilateralism was evident in last year's adoption of the Pact for the Future. But for this cooperation to materialize, the world could well use some "depolarization." 2025 will show whether this is in the cards – or whether the world will grow yet more divided than it is.