2026: The year we stop pretending it's just a phase

Ten key foreign policy trends for the year ahead

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This year, we decided to finally relinquish our state-of-the-art scoring algorithm to a less interested party. But lest things get out of hand, the authors have outsourced this thankless task to an ECFR colleague: Chris Herrmann, our intrepid US programme coordinator. It may explain why we did slightly less well than in previous years (despite achieving a nevertheless impressive 7 out of 10 points)—although this may also have something to do with the current, more volatile geopolitical situation.

The world will not fall apart in 2026, but its main institutions will be hollowed out; the links between countries will be weaponised; and we will continue to muddle through an illiberal wave which is clearly not just a phase

The main story of 2026 will be the further decay of the liberal order, driven as much by a crisis of legitimacy within the West as by the challenge from rising powers which feel under-represented within it. The world will not fall apart in 2026, but its main institutions will be hollowed out; the links between countries will be weaponised; and we will continue to muddle through an illiberal wave which is clearly not just a phase.

Here are our ten foreign policy trends for 2026—along with two bonus predictions.

Ten foreign policy trends

1. Europe normalises political decay, rather than reversing it

The far right makes further inroads across Europe. The Alternative for Germany (AfD) wins an outright majority in Saxony-Anhalt, breaking a psychological barrier more than a governing one. In France, prime minister Sébastien Lecornu's government collapses under pressure from both left and right. In Britain, Labour's poor performance in the May local elections triggers a leadership crisis that exposes the fragile balance between the party's internal factions. None of this produces a continental emergency. Instead, European leaders quietly adapt to democratic erosion as a condition to be managed rather than defeated.

2. Trump strikes a "new" Iran deal that looks a lot like the old one

The Trump administration concludes an ambitious agreement with Iran that closely resembles the Obama-era Joint Comprehensive Plan of Action (JCPOA): nuclear restraint in exchange for sanctions relief. The difference lies in presentation rather than substance. This time, the deal includes explicit incentives for American companies to invest in Iran, has some unkind words of Iran's ballistic missile programme and is framed as a commercial victory rather than a diplomatic compromise. International outrage proves fleeting; the agreement holds.

3. Europe's techlash turns openly protectionist

Rising coercion from both China and the United States pushes Europe into a more confrontational regulatory stance. The European Commission levies large fines on X and other US tech companies, restricts their access to European markets and tightens enforcement of digital regulations. At the same time, new cybersecurity and industrial rules effectively block Chinese electric vehicles and renewable technologies from Europe. Strategic autonomy becomes the language through which old-fashioned protectionism is justified.

4. The US signals disengagement from Europe without dramatic withdrawal

Washington finally publishes its long-delayed Force Posture Review. It announces only modest troop withdrawals from Europe, disappointing both transatlanticists and restrainers. But the accompanying message matters more than the numbers. The administration makes clear that further reductions will follow unless Europeans assume far greater responsibility for their own defence. The threat is less abandonment than indifference.

5. Ukraine accepts an uneasy ceasefire it did not design

An uneasy ceasefire between Ukraine and Russia takes hold. It is driven by Ukrainian exhaustion and American insistence rather than European diplomacy. Kyiv accepts a fairly lopsided arrangement because the alternative is fighting Russia alone. Europe plays little role in shaping the deal and even less in en[illegible] ceasefire unlocks elections and Ukraine's Volodymyr Zelensky is replaced as president. The war does not exactly end, but it freezes into a legally unre[illegible]

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politically corrosive stalemate.

6. Pressure mounts on Britain to align economically with the EU—without progress

Domestic pressure grows on Britain's prime minister Keir Starmer to pursue closer economic integration with the European Union, including joining the customs union. But official talks between London and Brussels continue to go nowhere. Britain drifts toward partial alignment through necessity rather than strategy, while both sides avoid formal commitments that would require political capital they no longer possess.

7. Democrats win the US House of Representatives, with little impact on governance

In the 2026 midterm election, Democrats retake the House by campaigning relentlessly on affordability and embracing a form of progressive economic nationalism. They fail to win the Senate. President Donald Trump declares the results a mandate and announces he will continue governing exactly as before. Democrats hold a lot of hearings but no Trump administration officials show up.

8. AI strengthens the state more than it disrupts society

Artificial intelligence reshapes state capacity faster than labour markets. Governments deploy AI to improve tax collection, surveillance, military logistics and regulatory enforcement. The immediate impact is not mass unemployment or social upheaval, but a quiet expansion of administrative power. States become more capable even as public trust continues to erode.

9. The Green Deal becomes the Khaki Deal

The "greenlash" of 2024 and 2025 hardens into a new policy reality. European governments talk less about climate leadership and more about "energy sovereignty". Decarbonisation advances only where it serves strategic and military objectives, such as securing supply chains or supporting defence logistics. Climate policy survives, but only when it can pass a security test. If you want a solar panel in 2026, you had better paint it camouflage.

10. China does not invade Taiwan, again

China, focused on worsening internal economic problems, once more refrains from invading or blockading Taiwan. The non-event reinforces a global mood of grim satisfaction. The absence of catastrophe becomes the benchmark for success, lowering expectations for international politics even further.

Our two bonus predictions

Bonus prediction one: Gaza stabilises just enough for diplomacy to move on

An uneasy ceasefire in Gaza holds long enough for Israel to claim it has made peace. Saudi Arabia and Israel conclude an effective expansion of the Abraham Accords, gradually normalising relations. As part of the arrangement, Trump offers Saudi Arabia a security guarantee similar to the one he extended to Qatar in 2025.

Bonus prediction two: Global south debt troubles deepen without a single crisis moment

Sovereign debt problems across the global south intensify, but without producing a single systemic crisis. Defaults, restructurings and rollovers continue in a fragmented, country-by-country fashion. There is no Bretton Woods moment, only mounting political pressure, constrained reform and rising populism across many indebted states.

Further listening

Listen to the *World in 30 Minutes* podcast episode "Predictions and reckonings: From 2025 to 2026" with Mark Leonard and Jeremy Shapiro.

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