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THE EU AND THE GLOBAL SOUTH: FROM PARTNERSHIP TO STRATEGIC ALLIANCE



ABSTRACT

International cooperation is experiencing its deepest crisis in decades. Force is replacing rules as the language of international relations. The United States has dismantled USAID, and the United Kingdom and several EU member states are cutting official development assistance (ODA). But beyond finance and rhetoric, international cooperation has not made the qualitative political transformations necessary to build a new international order and redesign effective and equal multilateralism. While actions are taken in pursuit of that goal, they are scattered and often contradictory. They fluctuate between a transactional, interests-based approach and a means of addressing socio-economic divides among countries. This must be addressed in order for change to happen - in particular, to avoid continuation of a pattern whereby priorities are set in OECD countries, policies are incoherent, and success is measured by the amount of money mobilised rather than the transformations achieved.

This policy brief argues that Europe and its member states, who together remain the world's largest provider of development financing, need a strategy of "cooperative autonomy" with the Global South in order to redesign cooperation in pursuit of transformative policies. By cooperative autonomy, we mean the ability to negotiate and diversify partnerships, and make them reciprocal. Global Gateway should become the testing ground for this alliance and the operational tool linking internal EU transformations to its partnerships with the Global South. The negotiation of the 2028-2034 Multiannual Financial Framework (MFF) is the moment to make this choice.

This new strategy of cooperative autonomy must be rooted in a broad, bottom-up approach that goes beyond cooperation between governments and supranational institutions. In order to build genuine and lasting partnerships, meaningful democratic participation of civil society actors and political decision-makers in both the EU and its partner countries is required. Such a people-to-people approach would not only strengthen the legitimacy and ownership of cooperation but also help ensure that shared priorities are defined jointly rather than imposed from above. The European Parliament, as well as national parliaments in both Europe and the Global South, have a crucial role to play in programming and monitoring joint policies, fostering democratic dialogue, ensuring accountability, and anchoring these partnerships in the societies they are meant to serve.

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1. The EU in a changing global setting

The global order that emerged after 1945 is undergoing a profound geopolitical and geoeconomic transformation. The rules-based multilateral system, as well as international law, is undergoing a systemic rupture that is being driven by world powers. Geopolitical fragmentation, declining trust in international institutions, and growing competition among major powers characterise the current international state of play. **Blatant violations of international law and the abrupt defunding of international aid have resulted in an increase in armed conflicts, protracted humanitarian crises and forced displacement.** These are compounded by the intensifying impacts of climate change, which remain insufficiently addressed.

Returning president Donald Trump's weaponisation of trade and open use of illegal force and sanctions against international justice mechanisms accelerated these trends. The transatlantic alliance is eroding faster than Europe is ready to admit. The US is pressuring its traditional allies to align with US strategic priorities while also openly imposing its own sphere of influence across the Americas. This radically changes the profile of globalisation, introducing the need for an element of trust which, in turn, opens new avenues for alliance building.

The world is becoming multipolar, but not necessarily more equitable. China has become a critical economic, technological and diplomatic actor across the world. Global South countries have close ties with China while also maintaining relations with Europe and the United States. They pursue multi-alignment to expand their autonomy and negotiating space. This transition towards multipolarity is unfolding alongside an increasingly violent and militarised international order. In 2025, over 65 active armed conflicts around the world were reported – the highest since the Second World War.[i] Military spending is the highest on record,[ii] and has been rising consecutively for 11 years. Europe has seen a sharp increase, with NATO countries' combined military spending representing 55% of total global spending.[iii]

Against this turbulent geopolitical background, Europe's response – namely, strategic autonomy – remains ill-defined. It is repeated in summits and policy documents without a clear answer to the question that matters most: autonomy to do what, and with whom? The Commission and many member states now concentrate on military power and internal productive capacity. These are important, but they do not make a strategy on their own. They also neglect Europe's real advantages in the international arena, including the largest single market in the world and its role as the main provider of development and humanitarian assistance. **A Europe that equates security with rearmament alone and competitiveness with self-sufficiency does not become stronger. It becomes more vulnerable and less relevant in a system that remains global.**

Real autonomy is not the opposite of interdependence. It is the political capacity to govern it: to diversify dependencies, negotiate them and make them reciprocal. We call this cooperative autonomy. For Europe, this means recognising that countries of the Global South are not peripheral to its strategy, but essential partners in shaping its autonomy. For these countries, it means engaging in alliances that advance their own priorities without compromising their freedom to pursue other relationships. Such an approach can only succeed if both sides recognise its value, particularly in a context of growing geopolitical fragmentation and competition over technologies, markets and international rules. It also requires moving beyond separate external instruments (trade, cooperation, climate, investment and security) towards a coherent strategy built around jointly defined objectives and shared interests.

Coalitions matter in multilateral forums too. Europe's formal influence turns into real weight only if it can build majorities, and it cannot do so while defending unchanged the advantages it retains in an order where the Global South feels under-represented. Nor can it subordinate cooperation to short-term security or migration objectives, trading long-term peace for short-term gains and damaging trust with partners for years. Moreover, circular mobility and the diaspora should be positively regarded,

including the socio-economic effects of remittances in countries of origin.

The case for such coalitions is also material. Climate change, pandemics, the governance of artificial intelligence and financial stability cannot be managed within European borders. Europe's internal growth is weak, and its share of the world economy is declining, while much of future growth and demand lies in the countries of the South. European competitiveness requires a foreign economic policy able to secure supplies and keep markets open. The green transition makes this evident. **Africa holds a large share of world reserves of cobalt, manganese and graphite, on which the EU structurally depends, and has vast solar and wind potential close to Europe.** A strategy that relocates extraction to aligned countries, considered reliable partners because of shared values and strategic interests, without developing local capacities in refining, components manufacturing or agro-processing industries, would reproduce historical patterns of economic dependency in a new guise.

The international peace and security architecture should also form part of this wider agenda. Norms regulating the use of force are increasingly being violated, and international justice mechanisms are coming under attack. Yet EU and Global South countries have adopted diverging geopolitical stances in response to these violations. Many countries of the Global South did not align with Western positions on sanctions against Russia despite the illegal aggression against Ukraine, although they largely condemned the aggression at the UN. Meanwhile, the EU and many European countries have continued to maintain commercial, political, and some even military ties with Israel, despite findings by the UN Independent International Commission of Inquiry that Israel has committed genocide in Gaza.[iv] Yet, EU countries and most Global South countries advocate for a world in which international law is respected, thereby enhancing its observance and ensuring accountability and effective global governance.

Cooperation on peace and security between the EU and the Global South has become more limited in recent years. Since the start of Russia's illegal aggression against Ukraine in 2022, much of the EU's external action funding has been significantly diverted towards Ukraine.[v] This re-orientation has negatively impacted much-needed funding for conflict settings in Africa and other parts of the world where the EU has historically played a central role in supporting peace and security.[vi] **The proliferation of terrorism, armed non-state actors and protracted violence in Africa, for example, has consequences not only for the continent, but for European security.** If a more peaceful and secure order is to be achieved, EU-African Union cooperation on peace and security must be strengthened – a task that requires solid political commitment and reliable funding for peace and conflict prevention.

2. Cooperation at a crossroads

Cooperation is crucial for building coalitions, but it is at a crossroads. The traditional donor-recipient model has been significantly weakened. In 2025 the United States dismantled USAID, the world's largest cooperation agency. Overseas development assistance (ODA) from OECD donors fell by 23.1% in real terms, to USD 174.3 billion – the steepest drop on record. Seventeen EU member states cut their aid in 2025 – Germany by 17.4%, France by 10.9%, and Belgium by 22% – marking the third consecutive year of decline. EU institutions meanwhile cut theirs by 13.8%. The United Kingdom is lowering its aid to 0.3% of gross national income by 2027 and using the gain to finance defence. The OECD expects a further fall of 5.8% in 2026.

These cuts have immediate human consequences. Abrupt defunding has disrupted health systems that depended on USAID, as rapid assessments in Colombia, Kenya and Nepal show. **Humanitarian crises are severely underfunded, and protection for displaced people is eroding.** The risk is not only that cooperation shrinks, but that it disappears as a political project before it has had the chance to renew itself.

Europe still has influence. Even after these cuts, **the EU and its member states remain the world's largest provider of development assistance and a leading trade and investment partner in Africa, Latin America and Asia.**[vii] What undermines this influence is a deficit of resources and a model by which the EU currently partners with Global South countries, the latter shows on three levels:

1. **Governance**: partners are consulted downstream, on agendas defined elsewhere.

2. **Coherence**: EU trade, climate and migration policies weigh on partner countries more than cooperation does, and often contradict it.

3. **Measurement**: Europe counts resources mobilised and projects delivered, not transformations achieved.

The three share a root cause. **Europe still designs cooperation on the basis of what it offers, not what its partners ask for**. Addressing the problem with its model is a condition for reversing the deficit of resources.

Today, meetings on the reform of the multilateral architecture and international cooperation occur frequently and diagnoses converge, but the move from talk to action remains limited. **Europe must change what it controls directly, including cooperation, Global Gateway, trade, climate and investment, co-defining priorities and actions with the Global South**. At the same time, it must use its weight to reform the multilateral financial architecture. This also requires moving beyond individual agreements towards what we call an "avenue approach"[viii] to international cooperation, one based on continuous political dialogue, mutual engagement and strategic cooperation rather than isolated transactions. Such partnerships must extend beyond governments and institutions, and involve progressive political forces, trade unions and civil society in building trust and ensuring that social justice, ecological transformation and shared prosperity remain central to cooperation.

3. What the countries of the South ask

3.1 What they ask of multilateralism

Representation: The Bretton Woods institutions still reflect the balance of 1944. The 16th General Review of IMF Quotas increased resources without realigning votes. The Global South no longer asks for an invitation to the table but for the power to set the agenda, by rebalancing quotas and voting rights, and bringing its own tax and debt rules to the United Nations. At the initiative of the African Group, the UN General Assembly launched negotiations on a framework convention on international tax cooperation in 2023, and the African Union has become a permanent member of the G20. The UN Security Council is also unrepresentative of today's world: Africa and Latin America have no permanent seats. The demand for a more representative and effective UNSC is also shared by other Global South and European countries.

Fiscal space and debt: According to UN Trade and Development (UNCTAD), 3.3 billion people live in countries that spend more on debt interest payments than on health or education. The G20 Common Framework has produced slow and partial restructurings. The Bridgetown Initiative, the Africa Expert Panel of the South African G20 presidency and the Compromiso de Sevilla converge on one point: stability is not enough without resources to invest. They call for debt pause clauses after climate shocks, a lower cost of capital and fairer risk assessment. The problem is not only how much the South owes, but how much it pays to borrow. Debt service burdens crowd out the fiscal space needed for public services, climate resilience and productive investment. Effective and timely debt restructuring, including debt reduction where necessary, should therefore be treated as a condition for development financing rather than a separate technical concern.

Plural development paths: After decades of structural adjustment, the Global South claims the right to choose its own development path. It rejects eligibility criteria based on income per capita alone, which cut vulnerable countries off from concessional finance. The Multidimensional Vulnerability

Index adopted by the UN General Assembly in 2024 responds to this demand, and so do other indices that explore results beyond GDP, but they continue to be neglected in decision-making processes. Countries also ask for policy space for industrial policy, fair access to green and digital technologies and a reform of intellectual property rules.

Climate justice: At COP29, developed countries committed to mobilise USD 300 billion annually in climate finance for developing countries by 2035, far below the estimated USD 1.3 trillion needed annually. The Global South asks for predictable finance, largely in grants or concessional loans, and for a transition that does not become a new cause of trade barriers that are decided elsewhere. For many partners, adaptation to climate impacts is as urgent as mitigation. A credible alliance should therefore give climate resilience, disaster preparedness and the financing of adaptation a stronger place alongside decarbonisation.

3.2 What they ask of Europe

Coherence: The EU policies that weigh most on partners are often not cooperation policies. The Carbon Border Adjustment Mechanism (CBAM), the European Union Deforestation Regulation (EUDR), and trade agreements shape exports and jobs more than many investment projects. Partners contest the method of setting standards: rules decided in Brussels and applied unilaterally, with adjustment costs borne by the smallest producers. The same holds for migration policy, which increasingly ties cooperation to border control.

Climate and trade regulations should be developed through closer dialogue with partners. Measures such as CBAM and the deforestation regulation should be accompanied by support for adaptation, particularly for smaller producers, while trade agreements should preserve space for local industrial development and regional integration. Similarly, migration cooperation should prioritise legal pathways, skills and mobility rather than border control.

Local transformation: Countries rich in critical raw materials do not want to repeat the history of extraction without development. Indonesia banned exports of raw nickel in order to attract refining, and Zimbabwe did the same with lithium. The African Union's Agenda 2063 and the AfCFTA aim at regional value chains. Partners ask Europe for investment that creates local linkages, transfers technology and builds skills. Low- and middle-income countries prioritise economic transformation and human capital alongside poverty reduction and infrastructure. Digital infrastructure and artificial intelligence offer a further field for shared interests. Europe's emphasis on rights, public interest regulation and accountable technology could provide a basis for cooperation with partners seeking greater digital sovereignty, fair access to technological capabilities and alternatives to dependence on a small number of dominant providers.

Quality of finance: Partners ask for predictable, multi-year finance aligned with their national and regional strategies, free of paternalistic conditionality and of procedures that absorb scarce administrative capacity. They ask for lending in local currency, because exchange rate risk turns sustainable investments into unsustainable debts. They also ask that local firms, banks and public institutions take part in procurement and project governance.

Predictability: Where European budgetary decisions can alter funding priorities, partners need transparent multiannual commitments, early consultation on changes and jointly agreed procedures for managing interruptions. Mutual accountability must apply to the continuity of European commitments as well as to results achieved in partner countries.

Mobility: The Global South has the youngest population in the world, and Europe the oldest. Partners ask for legal pathways and fairer visa regimes without accelerating brain drain. Diasporas and remittances can contribute to development, but require policies that support their economic and social engagement rather than treating mobility primarily as a border control issue.

3.3 A plural South, a common principle

The demands of Global South countries are not uniform. A heavily indebted low-income country asks first for fiscal space and concessional finance. Countries such as India, Brazil, South Africa or Indonesia ask mainly for voice in decisions and access to technology. Middle-income countries fear losing concessional finance before completing their structural transformation. Small island states put climate vulnerability first. Regional organisations, from the African Union to CELAC and ASEAN, are increasingly where these priorities germinate.

These countries do not share a single strategy or set of alliances. **What connects many of their demands is the pursuit of greater room for independent choice: the ability to diversify partnerships, strengthen regional institutions, negotiate rules and cooperate on specific goals without being drawn into exclusive blocs**. Europe should offer cooperative autonomy as a shared possibility, not assume that partners have already embraced a European formulation of it.

This is also why many partners resist reading Global Gateway as Europe's answer to the Belt and Road Initiative. That framing asks them to choose, which is the opposite of what they seek.

Table 1. What the Global South asks and how Europe responds

Global South demand	Addressed to	Prevailing response today	Proposed direction
Voice and agenda-setting power	Multilateral system	Quota reviews without vote realignment Non-agreed redistribution of UNSC seats and P5 refusal to give up veto power	EU support for IFI reform and the UN tax convention EU support for greater Global South representation in the UNSC and limits on veto use
Fiscal space and debt	Multilateral system	Slow, partial Common Framework	Link Global Gateway to debt and MDB reform
Cost of capital and ratings	Multilateral system and EU	Risk assessed with external methods	Joint facility and shared risk methodologies
Recognise and support global public goods.	Multilateral system.	Treated as ODA and underfunded, including funding reductions (WHO, UN-AIDS, WFP, UN itself, etc.)	A Global Public Investment model of joint contributions based on ability and allocations based on recognised need.
Address trade, investment and related treaties that impose policy constraints that inhibit development.	Partner countries in such agreements.	Continued privileging of interests of large corporations based in EU and enabling of rent appropriation in such treaties.	Recognise demands and reconsider treaties as appropriate.
Plural paths and policy space	Multilateral system	Income-based criteria, uniform rules	Vulnerability-based criteria, space for industrial policy
Climate justice	Multilateral system and EU	Commitments below needs	Predictable, concessional finance
Policy coherence	EU	Unilateral regulation (CBAM, deforestation)	Negotiated rules and support for adjustment
Local transformation	EU	Priority on security of supply	Co-designed value chains
Mobility	EU	Security-driven approach	Legal pathways and Talent Partnerships at scale
Autonomy, no blocs	EU	Global Gateway read as counter-BRI	Open alliances in variable geometry

4. From partnership to strategic alliance

The platform's consultations identified four traps to avoid: (1) the paternalism of traditional aid; (2) a transactional mercantilism that bases cooperation on access to markets and raw materials; (3) a claim of exclusivity that subordinates every relationship to bloc competition; and (4) the idea that cooperation serves European needs that the South should simply adopt. Europe should therefore move from partnership to strategic alliance with countries of the South.

In official language, "partnership" has lost its meaning and now names every external relationship, from trade to migration. It also preserves the structure of one side offering and the other accepting: Europe sets the agenda and consults partners, who sit in European bodies as observers; its interests remain implicit or are framed as common agendas; success is counted in resources mobilised with European guarantees and projects delivered.

A strategic alliance works differently. **The agenda is set jointly and upstream, interests are declared and negotiated, bodies are co-chaired and co-governed, financing and risk assessment are shared, and success is measured by transformation achieved.** Co-development is its content: a mutual transformation in which both sides change their economies and institutions. Cooperative autonomy is its condition: the alliance is not exclusive and does not ask partners to give up other ties.

The reason for moving from partnership to strategic alliance is clear. Europe should neither replicate the transactional approach of the United States nor imitate China's model of engagement. Moreover, leaving engagement with partner countries mainly to European companies and financial markets would contravene EU values and legal obligations rooted in international solidarity and poverty reduction. It would also be strategically flawed. Industrial capabilities, critical raw materials, energy and digital infrastructure, climate resilience and the stability of partner countries are too strategic for market incentives alone. Public institutions must set strategic directions, support public goods and take risks that markets will not. Private investment can then contribute capital, technology and productive capacity.

On this basis, the alliance rests on six principles:

1. **Tangible results on both sides, and shared financing**: A credible alliance must deliver for both sides: diversified value chains and economic opportunities for Europe, productive transformation for partner countries. Europe must ask not only why it needs the Global South but why partners should choose Europe. Mutual benefit should also shape financing. Many Global South countries keep mobilising their own resources, including through South-South and triangular cooperation, and European concessional finance can complement them around jointly defined priorities, reinforcing ownership and shared responsibility.

2. **Declared and negotiated interests: Europe has legitimate interests in the Global South**: secure supplies, markets, stability and shared management of migration. Presenting them as common agendas breeds mistrust. Instead, openly declaring them as interests allows Europe to negotiate them against its partners' interests in local transformation, jobs, technology and fiscal space. Reciprocity does not mean symmetry between unequal economies. It means verifiable benefits for both sides and the right of partners to say no without losing access to cooperation.

3. **Co-decision upstream**: Consulting partners on projects already designed is not enough. Global South countries should partake in setting the agenda, creating governance structures, making decisions on financing, and monitoring and evaluation. Democratic co-governance also requires a stronger role for parliaments on both sides. The European Parliament should help shape the strategic direction of EU development policy, translating commitments to poverty eradication, human rights, equality and sustainable development into legislative and budgetary priorities, rather than merely scrutinising decisions already taken. Partner

country parliaments should likewise participate in shaping priorities and ensuring democratic accountability. Regional organisations, local authorities, firms, trade unions and civil society should also be involved in this process.

4. **Bottom-up substantive participation**: Participation must not be confined to government-nominated interlocutors or formal consultations. Independent community organisations, workers, trade unions, environmental groups and local authorities need opportunities to influence priorities before projects are selected and to challenge decisions during implementation.

5. **Structural change as the measure of success**: Investments should be judged by the lasting domestic capabilities they build, not only by the capital they mobilise or the infrastructure they deliver. Local value creation, SME participation, skills, decent jobs, reduced inequality and technology transfer should sit at the centre of investment strategies. Regional integration deserves support where scale is essential, notably in energy, logistics, industrial value chains and digital markets.

6. **A progressive compass**: Many now justify cooperation only by European competitiveness or geopolitical rivalry. A progressive approach does not deny these interests, yet nor does it stop there. Decent work and the ILO core labour standards, social dialogue, a just transition for workers, tax justice and gender equality are not added constraints. They are the conditions for investments to produce transformation and public support, in Europe and in partner countries alike.

5. Turning principles into commitments

These commitments set out what Europe should change and how. Their operational translation in Global Gateway and in the next MFF is developed in a companion paper.

Joint political and democratic governance should begin before programmes and investments are designed. **EU institutions and partner governments should co-define medium-term priorities through regular dialogue and joint programming, with clear responsibilities and transparent decisions**. Regional organisations can help where they have a mandate and capacity, but representation should be adapted to the issue and the region rather than assumed to flow from a single continental institution. Parliamentary scrutiny on both sides and meaningful participation by independent civil society, trade unions, local authorities and affected communities should be integral to this process.

Financing arrangements should reflect shared priorities and distribute both risks and gains fairly. European grants and concessional resources remain essential for poverty reduction, human development and fragile contexts; they should complement, rather than be displaced by, private investment. **Jointly designed financing with Global South development banks and other local institutions can expand local currency lending, improve risk assessment and support productive investment**. Predictable multiannual commitments, transparent financing terms and support for debt relief where necessary are equally important to long-term credibility.

Policy coherence is another practical test. **Under Article 208 TFEU, the EU should systematically examine the development and distributional effects of its trade, climate, industrial and migration policies, and consult partners early enough to shape implementation, under the scrutiny of the European Parliament's Development Committee**. This includes meaningful dialogue on CBAM and deforestation rules, support for adjustment costs, differentiated transition periods, recognition of equivalent certification systems, and a share of CBAM revenues for industrial decarbonisation and a

just transition in partner countries. Agreements that strengthen processing, skills, SMEs and regional value chains rather than simply securing raw-material exports should also be discussed. Critical raw materials are the most immediate test: strategic partnerships and projects outside the Union should include explicit commitments on local processing, component manufacturing, technology transfer and skills, and should recognise partners' right to use industrial policy tools, including restrictions on raw mineral exports. Secure supply comes from partners who retain value, not from partners who give it away.

Development cooperation should not be conditioned on border control. The EU should instead scale up Talent Partnerships and legal pathways, with investment in training in countries of origin.

More ambitious cooperation could focus on establishing a common Euro-African digital ecosystem, including cloud infrastructure, to expand technological capabilities and unlock new opportunities for economic development in both regions.

A shared evaluation and learning approach should focus on outcomes, not merely spending or projects delivered. Partner country statistical offices, universities, researchers, social partners and independent community organisations should help define the questions, indicators and methods. **Public reporting should examine who benefits from cooperation, including decent jobs, inequality reduction, gender equality, human capital, local value creation and climate resilience**. Evidence and data should be accessible to partner institutions and feed into subsequent joint decisions, without creating another parallel reporting system.

6. Variable geometry: A laboratory of multilateralism

Global Gateway can enable an era of variable-geometry multilateralism. This does not mean rebuilding a universal system from scratch. It means experimenting with coalitions around concrete missions, with partners that vary by theme: regional organisations, Global South development banks, and middle powers, including through triangular initiatives. The platform's consultations identified four pilot areas where global mechanisms are stalled and smaller coalitions can deliver: green technologies and the ecological transition; industrial transformation and value chains; artificial intelligence and digital public infrastructure; and technology governance. What works can then be generalised through existing multilateral institutions, so that Global Gateway feeds the reform of multilateralism rather than competing with it. The companion paper sets out how Global Gateway's governance, financing and evaluation can host these pilots.

These coalitions should remain open and non-exclusive. In areas such as AI governance, where genuinely global standards are needed, smaller joint initiatives should be understood as practical contributions to wider multilateral processes, not substitutes for inclusive global rule-making.

In practical terms, this would mean starting with a small number of jointly defined missions, assembling the countries and institutions best placed to deliver each one, agreeing shared governance and measurable public good objectives, and reviewing results before expanding the approach.

7. Conclusion

International cooperation for development is neither charity nor a minor chapter of foreign policy; nor can it be reduced to just a trade or defence component of international relations. In a fragmented world, it is one of the few instruments through which Europe can build trust, strengthen its economic security and help govern global public goods. Cutting it, or subordinating it to other policies, means giving up this possibility when it is most needed.

Development investment is also a first line of human security and resilience. By supporting livelihoods, essential services, social cohesion and climate adaptation, it can reduce vulnerabilities that otherwise intensify instability, displacement and insecurity. This wider contribution should be recognised without subordinating development objectives to short-term security agendas.

The move from partnership to alliance is not a matter of vocabulary. It changes who sets the agenda, how risk is assessed, how results are measured and which European policies must adapt. It asks Europe to declare its interests and negotiate them with those of its partners, and to accept that countries of the South choose their own paths and allies. **The cooperative autonomy of the South and the strategic autonomy of Europe converge on a common interest: a world not divided into blocs but governed by negotiated rules**.

Europe should present itself not as the leader of this process, but as a strategic ally. Its added value lies less in the scale of its resources than in its experience of negotiated integration, multilevel institutions and shared rule-making. As the companion paper argues, Global Gateway offers the opportunity to test whether this transformation is possible.

The window is narrow: if Europe does not use it, others will occupy the space of cooperation on their own terms.

Key recommendations

- **Move from partnership to strategic alliance:** Set the agenda jointly and upstream, declare and negotiate European interests openly, and judge success by the transformation achieved rather than the money mobilised. Global Gateway is the first place to test this.

- **Make EU policies coherent with the alliance**: Build open coalitions for global public goods. Work with willing countries and regional organisations on climate adaptation, green technologies, industrial development and fair digital governance, without requiring exclusive geopolitical alignment or replacing universal multilateral institutions.

- **Finance transformation, not only transactions:** Offer predictable multiannual finance, local currency lending and debt relief where necessary, and use Europe's weight to reform the multilateral financial architecture, including the multilateral development banks and the UN tax convention.

- **Measure what matters, together**: Build a common framework with partner governments, researchers, social partners and civil society, centred on decent jobs, local value creation, reduced inequality and gender equality.

- **Strengthen democratic ownership and accountability**: Parliaments in the EU and the Global South should help shape development cooperation through legislative and budgetary decisions, while scrutinising results. Meaningful participation by independent civil society, trade unions, local authorities and affected communities should be integral to this process.

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