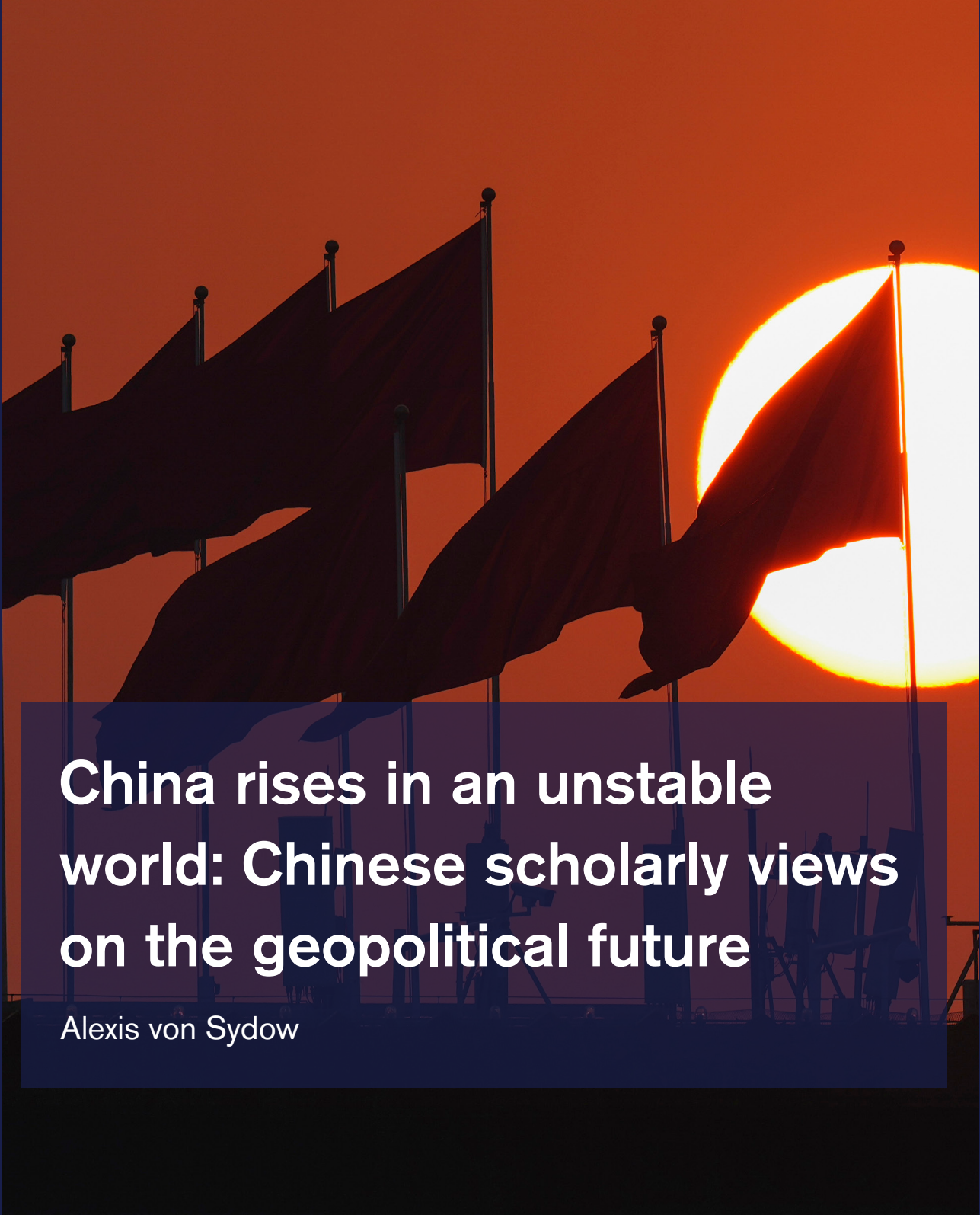


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China rises in an unstable world: Chinese scholarly views on the geopolitical future

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Summary

- This report investigates contemporary Chinese perspectives on the future of the international order. It examines forecasts published in the scholarly literature that touch on four key areas – China's position in the international order, the dynamics of the US-China relationship, China's ties with Russia, and the future of Europe – in order to provide a comprehensive understanding of Chinese future-oriented geopolitical thought.
- The analysed forecasts widely portray China as a central driver of global change. China is expected to expand its influence and take the lead on technological innovation and adoption. Analyses anticipate a prolonged period of instability and great power competition, frequently attributing systemic tensions to a declining US-led order that is gradually losing cohesion. China is seen as operating within a window of strategic opportunity amid intensifying rivalry.
- Chinese analysts almost unanimously expect the comprehensive rivalry between China and the United States to continue in the long term. Many foresee prolonged strategic decoupling and persistent contestation in the Asia-Pacific, shaped by US containment efforts. China's continued growth and movement towards economic and technological leadership could culminate in parity or superiority by the middle of the century.
- Relations between China and Russia are expected to remain stable and broadly positive. Russia is often viewed as China's key strategic partner. At the same time, analysts acknowledge latent tensions, including a growing power imbalance, as well as the possibility of deteriorating relations if Russia seeks renewed ties with the West or becomes wary of China's expanding influence.
- Europe is seen as a relatively weak and divided actor compared to United States and China, constrained by internal disunity and difficulty in defining and defending common interests. Europe is expected to remain tied to the United States in the medium term, although the transatlantic relationship is likely to weaken over time.
- For Europe, the results indicate that China is benefiting from the ongoing transatlantic split and will continue to prioritise its partnership with Russia to the detriment of Europe. To a large degree, its analytic community treats the tensions between the West and the non-West as fundamental. Europe should respond by treating China's rise as a geopolitical challenge and strengthening the fundamentals of its own power based on the assumption of continued Sino-Russian alignment.

Introduction

The geopolitical landscape is in a state of flux. Understanding the perspectives of key global players is essential in order to navigate future challenges. This report delves into contemporary Chinese scholarly discourse to explore how Chinese analysts see the future of the international order, with a special focus on China's evolving role. It examines forecasts in four central areas – China's position within the international system, the dynamics of the US-China relationship, China's relationship with Russia and the prospects for Europe – chosen to provide a reasonably comprehensive view of those aspects of Chinese thinking about the future that are particularly relevant to European interests.

China is an explicitly ideological one-party state. Consequently, all published discourse is affected by censorship and political correctness. This means that it can never be entirely established how discourse in published texts corresponds to genuine geopolitical thinking. Presumably, arguments and insights that are uncomfortable to the party-state are censored. However, this study assumes that there is an original level of analysis independent of both publicity and policy considerations that can be studied through academic writings. For this reason, the study is based on material that is judged comparatively propaganda-free: academic articles, think tank reports and, occasionally, scholarly analysis published in news media. The material, which amounts to around 60 separate texts, was identified using targeted keyword searches of Chinese academic databases. This material is part of the policy-knowledge system, rather than the state publicity system. Thus, by studying these texts, it is possible to discern tentative answers to what Chinese scholars and leaders really believe about the future.

Since the passage of time can rapidly make forecasts out of date, the study focuses on forecasts published since early 2022. Discourse can be expected to change over time. By excluding older forecasts, a reasonably up-to-date picture of the current discourse about the future can be presented. In this study, a forecast is any declarative statement about the future, such as “X will (not) happen” or “X is (not) likely to happen”. For the most part, conditional statements such as “if X is the case, then Y will happen” have been excluded. While linguistically forward-looking, such statements are often not primarily about the future, but rather analytic propositions. Forecasts as defined above are found in many types of texts, not just texts that are chiefly concerned with predicting the future. These are in fact rare in Chinese as well as in Western publishing, especially texts concerning the long-term future. The most common form of forecast in the material studied is remarks on future developments made in the context of a study of a specific theme.

Given the high degree of ideological alignment evidenced even in the Chinese policy-knowledge system, judgments on whether a given text constitutes primarily propaganda or bona fide analysis were made on a case-by-case basis. Forecasts that align too closely with statements by the Chinese authorities have been excluded, as have texts that, while ostensibly scholarly, appear to have been produced to make political points in connection with state visits, summits or other high level political events. Extra attention was paid to the rare cases where politically undesirable end-states are forecast, as this is more likely to reflect genuine analysis rather than political pandering.

The analysed forecasts seldom contain an explicit time horizon. It is not usually clear exactly when the writer believes that the forecast conditions will materialise. Often, one might

assume that forecasts concern the short to medium term (less than five years), which makes it difficult to extrapolate what Chinese analysts believe might happen 10 or 20 years from now. Nonetheless, the material still allows a mapping of the general shape of the discourse. Where a timeline is specified, it is included in the analysis.

The international system: Growing instability but opportunities for China

In the forecasts surveyed, China is viewed as an important driver of change in the international system. Several analyses single out the rise of China as a key factor behind global transformations and power shifts.¹ This dynamic is expected to persist in the long term. The future is a place where China wields more influence and increasingly takes centre stage globally.² China is portrayed as an actor that contributes to a continuing and better globalisation.³ China is widely expected to be among the foremost technological adopters and innovators.

The Global South, a term that in Chinese usage always includes China and sometimes functions as a placeholder for China, is expected to experience a surge of influence.⁴ Global South countries might become new great powers. Institutions such as the BRICS, the Asian Infrastructure Investment Bank (AIIB), and the Shanghai Cooperation Organisation (SCO) will increase in importance. The South is expected to become less dependent on the North, partly thanks to China's efforts to reform the international order.⁵

At the same time, almost all forecasts see significant instability ahead. It is believed that the world has entered a period of increased instability and confrontation, which is expected to last a long time. This instability is often portrayed as emanating from the United States.⁶ The United States is seen as the centre of a hegemonic world system that is cracking at the seams as the hegemon gradually loses its capacity to keep the system together in an orderly way.⁷ The relative weakening of the United States is not always explained by inherent US weakness. Frequently, it is linked to economic and technical development in other regions, especially China.⁸

Instability, of course, means greater risk of conflict. The future is characterised by great power competition, widespread disagreement on the guiding principles of interstate relations and only limited cooperation between great powers in important issue areas, including economic, military and technological affairs. Global development in each of these areas will consequently be characterised by conflicting values and interests.⁹ The West will try to disrupt China's international initiatives.¹⁰ Forecasts focused on technology expect that the level of technological adoption will create a "smart divide" between countries, which will give economically developed regions an inherent advantage.¹¹

An important theme in many forecasts is the gradual weakening and fragmentation of the West.¹² An erosion of its comprehensive national strength will mean that the United States loses its capacity to keep allies aligned with its interests. Clearly, this reflects a view of US-centred alliances as primarily outgrowths and tools of US power rather than truly multilateral mechanisms of equality and mutual benefit. A triumphalist strain of predictions sees the West as existing in a state of irreversible and terminal decline: "We must recognise and believe that no matter how the United States might sanction and suppress China, it cannot prevent us from 'rising' or prevent the US from 'falling'".¹³

Sometimes a growing division is foreseen between an ever more domineering and unilateral United States and other western actors. One consequence of this development might be fewer sharp contradictions between the West and non-western countries.¹⁴ However, another version of this scenario is that the non-US West tries to improve its relations with the non-western world while remaining broadly aligned with the United States. Demographics are highlighted as working against the West.¹⁵ The fact that demographics are also working against China is not mentioned.

It is notable that many forecasts, while describing declining western strength, expect the West to remain predominant for a long time.¹⁶ Not even the longest-term forecasts (mid-century) envisage a world where a putative transfer of the locus of global power from the West to China has been fully accomplished. However, the overall pattern of western decline predominant in most forecasts implies a window of strategic opportunity for China, which is sometimes spelled out.¹⁷ This is preconditioned on an absence of war with another great power, especially a large-scale war with the United States over Taiwan.

In a rare example of a comprehensive forecast on the decade to 2032, Tang Shiping (唐世平), a professor at Fudan University, touched on several of the themes mentioned above.¹⁸ Despite continual change and intense US-China competition, Tang does not expect the overall distribution of power in the international system to alter drastically during this period. According to his predictions, the main variable determining the long-term balance of power between the United States and China is the extent to which the United States and its partners are able to form a united front against China. In Tang's view, Europe will be a key factor. He expects the instability caused by the Ukraine war to last at least five years. While no new global wars are expected, if they do occur, an escalation of the Ukraine war would be a likely cause. The period of instability will finally end after 10–20 years.¹⁹

China and the United States: Continued rivalry

Almost without exception, scholars believe that there will be continued rivalry between China and the United States. The standard view is that China's relationship with the United States will remain competitive and conflictual even in the longest term.²⁰ In addition, the gradual worsening of relations will be "difficult to reverse".²¹ The rivalry is "comprehensive, full-spectrum" and long term.²² "There should be no hope that Beijing and Washington can find a lasting and sustainable peaceful coexistence".²³ One analyst expects the rivalry to last 15–25 years as a "preliminary estimate".²⁴ Another forecasts US-China bipolarity ("G2") by mid-century.²⁵

The United States is seen as inescapably committed to hostility towards China, as this constitutes a durable bipartisan consensus in US politics.²⁶ The rivalry between the two is expected to play out in several interconnected arenas. US efforts to contain China are identified as a main source of conflict, but such containment will not be successful.²⁷ However, a war with the United States, including over Taiwan, is deemed unlikely, at least in the medium term.²⁸

It is tacitly and sometimes explicitly understood that a main driver of structural US-China conflict is the rise of China. It is often stressed that China's rise is defensive, however, and that China is not seeking to challenge or supplant the United States.²⁹ China is expected eventually to replace the United States as the world's largest economy, but it is recognised

that this will not be a smooth process.³⁰ Exactly when this is expected varies, but its inevitability is seldom questioned. The technological factor is often invoked. China and the United States are seen as the two future technological superpowers in a world where other competitors are left far behind.³¹ Among other things, the United States is expected to try to use the AI race as a tool to dominate “the rest”.³²

There is disagreement over how long the United States will be able to maintain its position of “hegemony”. Some say that it will remain the largest economy for ten more years – coinciding with strategic US-China competition.³³ Trumpism is sometimes seen as a factor contributing to US decline and preventing it from shoring up its hegemony. Tariffs and other policies might cause important allies to lose confidence. However, Trump and Trumpism cannot determine the pattern of competition, which is structural and long term. The Trumpian ambition to reindustrialise the United States is often taken seriously, but Chinese analysts see it as unlikely that low-tech manufacturing in particular can be brought back.³⁴ Other factors that hamper US development are economic inequality, and racial and ethnic tensions.³⁵ It is sometimes explicitly stated that political contradictions, economic decline and social decay in the United States create favourable conditions for the rise of China.³⁶

One recurring point of contention is whether future US-China relations can be described using the term “Cold War”. While this question is partly semantic, it frames a debate on which elements of the relationship will be drawn into the dynamic of rivalry, or the extent to which rivalry – which is almost universally accepted – will dominate various aspects of the relationship. When a Cold War is taken to mean predominantly ideological rivalry, or a bloc-based confrontation, the description is seen as less apt and few analysts expect the rivalry to develop in such a way.³⁷ If Cold War describes a situation of gradual economic securitisation and decoupling, however, some believe that a Cold War already exists, or is at least imminent. Strategic decoupling – a situation where international cooperation, technology use and ideology are marked by a continued partitioning into rival US and Chinese camps – is sometimes foreseen as lasting for 10–20 years, or even longer.³⁸

Increased US-China rivalry is expected to manifest as intense competition over influence in the Asia-Pacific region.³⁹ This rivalry is expected to become China's most pressing security challenge, and is related to the United States prioritising Europe less – a trend that is expected to continue.⁴⁰ The importance of the ASEAN countries is set to increase, and their present balancing act between reliance on the Chinese market for economic growth and dependence on the United States for security will become increasingly unsustainable. There is a risk that ASEAN countries will be forced to align more decisively with one of the two rivals. Some believe that internal differences between the United States' Asian partners will lead to a break-up of the US alliance system in the region.⁴¹ Others expect the United States to strengthen its cooperation with Southeast Asian partners, especially in the South China Sea region (Vietnam, the Philippines and Indonesia).⁴² Other possible effects of US containment policy include an expansion and deepening of US regional alliances, such as AUKUS and the Quad.⁴³ An expected increased US focus on the Asia-Pacific means a higher risk of conflict in other geographies where the United States pulls back.⁴⁴

The forecasts often emphasise that the Taiwan question is the greatest point of contention between the United States and China.⁴⁵ Preventing cross-strait unification is sometimes seen as a core US interest,⁴⁶ creating a shadow image of the Chinese Communist Party's core interest in achieving unification. Consequently, one school of thought predicts that the

United States will gradually focus its military strategy on preventing China from unifying with Taiwan.⁴⁷ Nonetheless, escalation to war over Taiwan is seen as unlikely, at least in the next few years.⁴⁸ Whether or how this reflects the objective assessment of decision makers in the Communist Party and the military is impossible to say. Curiously, the political future of Taiwan – whether Taiwan will become part of China or remain independent – is not discussed in the forecasts. This question is probably considered too sensitive to make statements about.

One detailed forecast on US-China relations, made in 2025 by the Peking University economics professor Xia Qingjie (夏庆杰), foresees considerable US pressure on China until 2040. By that point, however, China is expected to have overcome the technological bottlenecks that enable continued US coercion, and thus to have achieved basic immunity from US sanctions on its high-tech sector. According to Xia, China will be the world's largest economy in 2040, as well as the most technologically advanced nation, and have military power parity with the United States. It will be at the centre of an international system that it leads – a system that helps developing countries achieve progress on their own. Xia says that 70 percent of China's exports will have Belt and Road Initiative countries as their destination. (The current share is already over 50 percent.) He expects the United States to reindustrialise, but this will be a 30-year process counting from 2025, and thus only partially accomplished by 2040. Manufacturing will only return to the United States in the few sectors where it enjoys a traditional monopolistic advantage: semiconductors, artificial intelligence and biopharmaceuticals.⁴⁹

China and Russia: An important partnership

Writing on Sino-Russian relations is heavily politicised. The de facto alliance with Russia is a core interest of the Chinese leadership and much of the commentary on the Russia-China relationship, even in academic publications, was treated as propaganda and therefore omitted from this study. Nonetheless, there were some analytical forecasts. Overall, relations between Russia and China are expected to remain positive.⁵⁰ Russia is labelled China's most important strategic partner.⁵¹ China's relations with Russia are seen as driven by interests such as border security, regional stability and energy cooperation. As these interests are expected to be long term, the current partnership is expected to be maintained.⁵² There is often an expectation that relations will grow even closer.⁵³ Rhetorically, the Russia-China relationship is consistently portrayed as compatible with the current world order, rather than a revisionist force.⁵⁴ More rarely, the partnership is portrayed as an axis that balances the United States. In this case, a balance of power between the United States, on the one hand, and China-Russia, on the other, is seen as a long-term configuration and a long-term struggle.⁵⁵

Despite the overall expectation of positive relations, there is a recognition of the limits to cooperation between China and Russia. New challenges are expected to arise.⁵⁶ "Differing strategic priorities" could set a limit on deeper cooperation, for example, in the Arctic.⁵⁷ Several analysts recognise a risk that China's relations with Russia might deteriorate over time. Such a deterioration could occur because of "internal contradictions" or US efforts to split the two.⁵⁸ One analyst summarises a "worst case scenario" where the growing power imbalance between the two, compounding latent conflicts of interest (including China's increasing influence in the traditional Russian sphere of influence in Central Asia), causes

Chinese political and economic pressure to build to a point where China emerges as the primary source of anxiety for Russia, leading it to view China as a threat.⁵⁹ Such a scenario would require that the current rivalry between the West and Russia were no longer present to the same degree, and is therefore unlikely in the short term. However, it would largely be a continuation of current trends, where the imbalance, especially in economic strength, between the two countries continues to grow.

A 2024 analysis believes that Russia is preparing to resume relations with the West, and that its “turn towards China” will only last for 6–10 years – partly because Russia fundamentally desires autonomy, not alignment with China.⁶⁰ In this view, it is primarily the West that is preventing a Russia-West rapprochement, and it is mainly Chinese interests that drive the deepening of Sino-Russian relations. These forecasts of a less positive relationship with Russia, while fewer in number, are notable because they indicate that, behind the propaganda, Russia and China are not necessarily viewed as natural partners. Instead, their current close relations are seen as a product of converging interests.

There are no illusions about Russia’s overall decline. Most forecasts expect Russia’s capacity to project power in its traditional Eurasian sphere of influence to decrease over time.⁶¹ This includes in key areas such as Central Asia and the Middle East. The Russia-centric order in these areas is expected to weaken or disintegrate. The Ukraine war is often seen as evidence of this weakening, but also as its catalyst or proximate cause.⁶² Russia is mostly described as stuck in a structural competition with the United States and the broader West. Despite overtures from the Trump administration, no substantial thawing of US-Russia relations is expected in the short to medium term. Most analysts expect strategic competition between Russia and the West to be long lasting.⁶³

One conclusion drawn from this is that Russia-West competition will weaken both camps. In this scenario, the two parties exhaust themselves to the point where the world system defaults to a return to the “values of the UN Charter”.⁶⁴ This is possibly meant to imply an opportunity for the rise of Chinese power, corresponding with the view of China as the prime defender of the UN-centred international system. Others forecast a continuation of tensions and a balance of power dynamic between Russia and the West even after the conclusion of the Ukraine war.⁶⁵

It is acknowledged that China’s close relations with Russia, especially in the context of an unfinished war in Ukraine, promote the formation of two rival political blocs globally. This is seen as in Russia’s interests, as it increases its capacity to balance against the West, but not necessarily in China’s best interest. In other words, analysts recognise that the China-Russia relationship is a factor in China’s relationship with the West. However, one analyst points out explicitly that China will not adapt its Russia policy to western demands.⁶⁶ In a conflict with the United States over Taiwan, Russia might be the only country capable of providing China with diplomatic and military support. For this reason, China will take care not to offend Russia’s great power ambitions.⁶⁷

Europe: Not so much an actor as a playing field

In official Chinese rhetoric, Europe – or at least the European Union (EU) – is often described as an actual or potential pole in the emerging multipolar system of international relations. In the forecasts surveyed, however, Europe is not seen as a player on a par with the United States and China. It is seen as a group of countries that often lacks consensus, and is consequently troubled by a difficulty in defining its own interests and, a fortiori, protecting those interests.⁶⁸ This state of affairs is expected to continue. Consequently, many foresee a more difficult and passive role for Europe in the future. Europe is expected to become a playing field where various interests clash.⁶⁹ Because its problems with decision making have structural roots, there is little expectation that Europe can resolve them in future.

This overall assessment is often paired with a view of Europe as an integral part of a traditionally US-led world that is experiencing internal strain to the extent that it might fragment. Naturally, at a time of considerable transatlantic volatility, Europe's future degree of alignment with the United States is difficult to predict for any analyst. From a Chinese scholarly perspective, uncertainty about the future of the US-Europe alliance precedes the second Trump administration, and there is a considerable degree of consistency between pre- and post-Trump analyses. The dominant framing is to portray the degree of US-Europe alignment as an aspect of US hegemony and as a function of US strength. The traditional function of NATO is routinely described as a way for the United States to control security policy in Europe.⁷⁰ The United States, in turn, is seen as inherently anti-Chinese in its long-term geopolitical orientation. The central question in many forecasts therefore becomes the degree to which the United States has the capacity to ensure European alignment with its agenda.

It is often assumed that Europe is aiming for what is called “strategic autonomy” in relation to the United States. The United States, for its part, wants to prevent the EU from becoming too autonomous. This basic conflict of interest might be accentuated over time.⁷¹ In this context, analysts identify a European tendency to assert autonomy selectively, and to adapt to US demands when central European interests are not at stake. This is seen as an unstable configuration.⁷² In future, some analysts believe that the United States will seek to actively prevent Europe from achieving autonomy, as this would be undesirable from the point of view of US hegemony.⁷³ Another school of thought believes that US strategic imperatives require reduced investment in maintaining hegemony over Europe. In such scenarios, the United States would in effect choose to cut Europe loose.⁷⁴ Disagreement on this point extends to analyses written since the return of Trump to the White House in 2025, indicating uncertainty among Chinese researchers about whether US policy under Trump constitutes an attempt to assert control over Europe or a way to disentangle itself from European commitments. That said, the most common forecast is that the transatlantic strategic link – a link that is reinforced by culture, education, security and economics – will persist in the medium term but weaken in the long term.⁷⁵ As Europe is forced to take on heavier security burdens and trust less in the United States, the future of NATO is seen as unclear.⁷⁶

Various fragmentation scenarios appear regularly in the forecasts. As the US hold over the European continent gradually loosens, centrifugal forces take over. National interests become predominant and the current limited degree of European strategic integration is seen as an insufficient counterweight. One possible scenario is the formation of intra-European blocs, where nations choose to bandwagon with Russia or with the United States according

to their inclination and perceived interests. Large countries such as France and Germany might then move towards a normalisation of relations with Russia to balance against the United States, while the United Kingdom, Poland, the Nordic countries and other vulnerable Eastern European countries seek continued US support to balance against Russia.⁷⁷ The most common forecast, however, is that the deep-seated rivalry between Russia and the EU will continue, and their mutual relationship is sometimes described as a long-term balance of power.⁷⁸

Possible bandwagoning with China is not mentioned. Europe is generally expected to continue its derisking from China; that is, to reduce its economic and trade dependence on China. One analyst believes that Europe will maintain its pressure on China regarding Russia⁷⁹ – perhaps in a tacit admission that China's close partnership with Russia sets pragmatic limits on the extent of China-Europe cooperation. However, there might still be opportunities for China. One analyst expects France and Germany to prevent the EU from bandwagoning with the United States in its efforts to contain China.⁸⁰ This analysis sits well with the common tactic in Chinese diplomacy of appealing to influential EU member states in an attempt to undermine EU consensus.

Summary of analytical themes

In the texts surveyed, **political instability** is perhaps the most frequently mentioned driver of future international developments. Often, political instability in the United States and the West is portrayed as a consequence of western political systems or the inherent flaws in liberal democracy. The superiority of the Chinese model is usually only implied, but sometimes made explicit. When explicit, such readings fade into Marxist-tinged explanations, whereby China, through its political system, harnesses the objective forces of history to gain ascendancy over imperialist and capitalist systems. More rarely, the political instability in the United States, or the West more broadly, is interpreted as one aspect of an ongoing political transformation of the West. This interpretation is less triumphalist, as it is less clear what this transformation might mean in the long term. The general weakening of the US-led world order can also be seen as political instability on a macro scale.

Technological and economic development is generally seen as a master variable behind shifting power balances. China is strong because of its industrial strength and technological achievements. The United States is weakening because it has lost much of its industrial strength and its edge as a technological superpower. Russia and Europe are relatively weaker players also largely because of their inability to meaningfully participate in the tech race. In comparison, other aspects receive less attention from Chinese analysts. For example, there are few references to **demographics** as a factor in future developments, and **climate or environmental factors** were not discussed in any of the texts surveyed.

The future of the world system is frequently described as **multipolar**. However, there are reasons to believe that frequent references to multipolarity are not purely analytical. In fact, an almost ubiquitous preoccupation with the importance of the US-China rivalry suggests that **bipolarity**, rather than multipolarity, is the implicit frame of many analyses. It is possible that Chinese analysts are wary of describing the world order as bipolar, as this might imply that China's bilateral relations with the United States are primarily hostile, which runs counter to China's stated preference to seek cooperation. In bipolar scenarios, China tends to appear

in the perhaps uncomfortable position of a revisionist power, or a conscious challenger of the traditional world order. The concept of multipolarity seems overall to be a better fit with China's normative vision of always forging win-win dynamics in foreign relations.

More broadly, there appear to be limitations on how the effects of **China's rise** can be portrayed. One of the most persistent framings is that we live in a world characterised by a waning but still palpable US hegemony. China is changing the international system by creating challenges and obstacles to this hegemony, but is not actively challenging it with its own hegemonical ambitions. China's growth is portrayed as organic, not directed at displacing the United States. It is the weakness of the United States that is creating chaos, not the strength of China. While the idea of a balance of power is commonplace, this seldom translates into a consistently realist frame of explanation, which would locate the source of conflict in that very balance of power rather than in the actions of one specific player. Instead, Chinese analyses often apply a politicised framing where the underlying phenomenon of two superpowers approaching parity of power is dressed up in moral language.

Conclusions: What do China's leaders believe?

To what extent is it possible to extrapolate from the scholarly discourse examined above to identify the "real strategic thinking" that goes on in the leadership compound at Zhongnanhai? By default, all such attempts will be somewhat speculative. Nonetheless, the preceding analysis provides a valid basis that allows some tentative conclusions about the basic framework within which the strategic thinking of China's leaders takes place.

First, China believes that time is on its side. In the long run, it expects to become the pre-eminent world power, or at least one of two superpowers. Over the long term, this by default makes China a revisionist power. In the short term, however, it will remain a status quo player, because current trends are seen as favouring China's development. This suggests a mindset among China's leaders that neither overestimates the importance of short-term events, nor underestimates the importance of long-term trends. China will appear to act defensively in relation to the United States and other actors because it fears disruption to a dynamic that is already favourable to its long-term ambitions. Consequently, it can also be expected that China will not act rashly to upset this dynamic.

Second, China perceives the other powers examined in this study as in decline. The United States is in a state of relative decline because of the rise of China as a competitor, but also in absolute decline because of political instability and unfavourable domestic trends. While this development is favourable to China in the long term, US decline is also the main driver of Chinese insecurity. This prompts defensive measures, which in themselves could contribute to further instability. Russia is seen a power in long-term decline, chiefly because it is technologically and economically stagnant. This judgment holds for the EU as well, but its position is arguably seen as even more insecure, due to its limited governance capacity and the negative knock-on effects of diminishing US power. China does not see itself as positioned to uphold global order during the disintegration phase that will result from the weakening of all three powers. It is therefore bracing for a period where there will be no stable international environment to support its own security and growth.

Third, the United States is and will remain the only actor that poses a serious active threat to China. China does not believe that the risk of a major great-power war is high, but it expects that the United States, even as a power in decline, will have the capacity and perhaps also the will to inflict considerable damage on Chinese interests. This threat perception is likely to remain a key driver of Chinese strategy in relation to other global partners. It prompts the overall strategic aim of promoting good relations with both Russia and Europe as a way of isolating the United States and strengthening opposition to it. The US threat to China will be most acute in China's home region, and China will remain focused on countering US influence in East and Southeast Asia. If US influence in this region weakens considerably, China might take the further step of establishing itself as a military actor with global reach. However, there are no indications of any such ambitions in the forecasts.

Finally, technological and economic development are always important background concerns in Chinese strategic thinking. Strength in these areas is seen as a master factor in comprehensive national strength and as a determinant of a country's long-term future. While China is and will remain an important diplomatic and security actor, its strategy for achieving global influence is fundamentally based on striving for technological and economic supremacy.⁸¹ China recognises that technological and economic ties have become a chief arena of geopolitical struggle. This fits with Xi Jinping's (习近平) concept of comprehensive national security, which identifies economic and technological strength as an aspect of the nation's security environment.⁸² Further securitisation of economic matters by China's leaders as geopolitical competition intensifies is therefore a highly plausible baseline scenario.

Consequences for Europe

Understanding China's long-term intentions is a necessary background to all China-related policy discussions on trade, investment, research collaboration etc. which currently take place in Brussels and European capitals. For Europe, the conclusions of this study offer various insights into exactly those intentions. First, China sees opportunities in the current deepening transatlantic rift. The ongoing rupture is viewed as a sign of US decline, and therefore as a development that enhances Chinese security. It is also viewed as a negative for Europe, which becomes more vulnerable to internal fragmentation and external pressure without US power. The material surveyed indicates that China might use the transatlantic split to create rifts within the EU and further its own interests. In sum, a deepening transatlantic rift risks exposing Europe to a much higher degree of negative Chinese influence. Conversely, the re-establishment of a strong transatlantic community would be unwelcome to China.

Second, China will remain firmly committed to its partnership with Russia for as long as it is able to. As long as Russia constitutes a significant challenger to the traditional US-led order, Europe cannot hope to convince Beijing to loosen its increasingly multifaceted cooperation with Moscow. China is likely to prioritise relations with Russia over Europe, as Russia performs indispensable strategic functions, while Europe is unreliable and disunited. Recent revelations of extensive Sino-Russian military cooperation support this conclusion.

Finally, despite its official rhetoric, China is unlikely to want to see a strong Europe in the long term. In the forecasts surveyed, favourable futures are generally those in which the Global South gains influence at the expense of the Global North. A relative weakening of the traditional centres of western power is portrayed as a prerequisite for a more just, or at

least a more advantageous, world order. A sizeable proportion of Chinese analysts believe in a fundamental dialectical contradiction between the West and the non-West, and routinely describe the West in adversarial terms. From this perspective, western decline means Chinese opportunity.

Europe should respond to China's long-term strategic outlook by strengthening internal and transatlantic cohesion. Where transatlantic friction becomes unavoidable, Europe should at least ensure that such friction does not become a pretext for deepening harmful dependencies on China. It should treat China's rise as a comprehensive geopolitical challenge and invest in the military, economic and technological foundations of European power based on the assumption of continued Sino-Russian alignment.



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