

A stylized world map composed of various shades of blue polygons, creating a low-poly or mosaic effect. The map is centered on the Atlantic Ocean, with Europe and Africa clearly visible. It serves as the background for the top half of the page.

DISCUSSION PAPER No. 415

Development cooperation in a changing European strategic environment

By Alexei Jones and Andrew Sherriff

September 2026

Geopolitical competition, fiscal pressures, changing domestic politics, shifting partner expectations and changes in the European policy landscape are reshaping the environment in which European development cooperation operates. It is increasingly part of a wider European strategic agenda, creating opportunities for greater coherence and leverage but also sharper tensions between European interests, development objectives and partner priorities.

This paper argues that development cooperation should neither be insulated from wider European interests nor simply absorbed into them. Its future will depend on Europe's ability to clarify what development cooperation is for, recognise its unique contribution and manage the trade-offs between different objectives and interests. This requires clearer choices about which objectives development cooperation is best placed to support, a financing and institutional toolbox that matches European ambitions, and negotiations on, rather than assumed alignment with partners' interests. The paper identifies ten factors likely to shape European development cooperation over the coming decade.

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Acronyms

AI	Artificial Intelligence
AI Act	Artificial Intelligence Act
CBAM	Carbon Border Adjustment Mechanism
CRA	Cyber Resilience Act
CSDDD	Corporate Sustainability Due Diligence Directive
DAC	Development Assistance Committee
DPP	Digital Product Passport
EEAS	European External Action Service
ESPR	Ecodesign for Sustainable Products Regulation
EU	European Union
EUDR	EU Deforestation Regulation
G7	Group of Seven
G20	Group of Twenty
GDPR	General Data Protection Regulation
HDP	Humanitarian-Development-Peace
ILUC	Indirect Land-Use Change
MFF	Multiannual Financial Framework
ODA	Official Development Assistance
OECD	Organisation for Economic Co-operation and Development
REACH	Registration, Evaluation, Authorisation and Restriction of Chemicals
RED II/RED III	Renewable Energy Directive II / Renewable Energy Directive III
SDGs	Sustainable Development Goals
USAID	United States Agency for International Development

1. Introduction: Development cooperation at a critical juncture

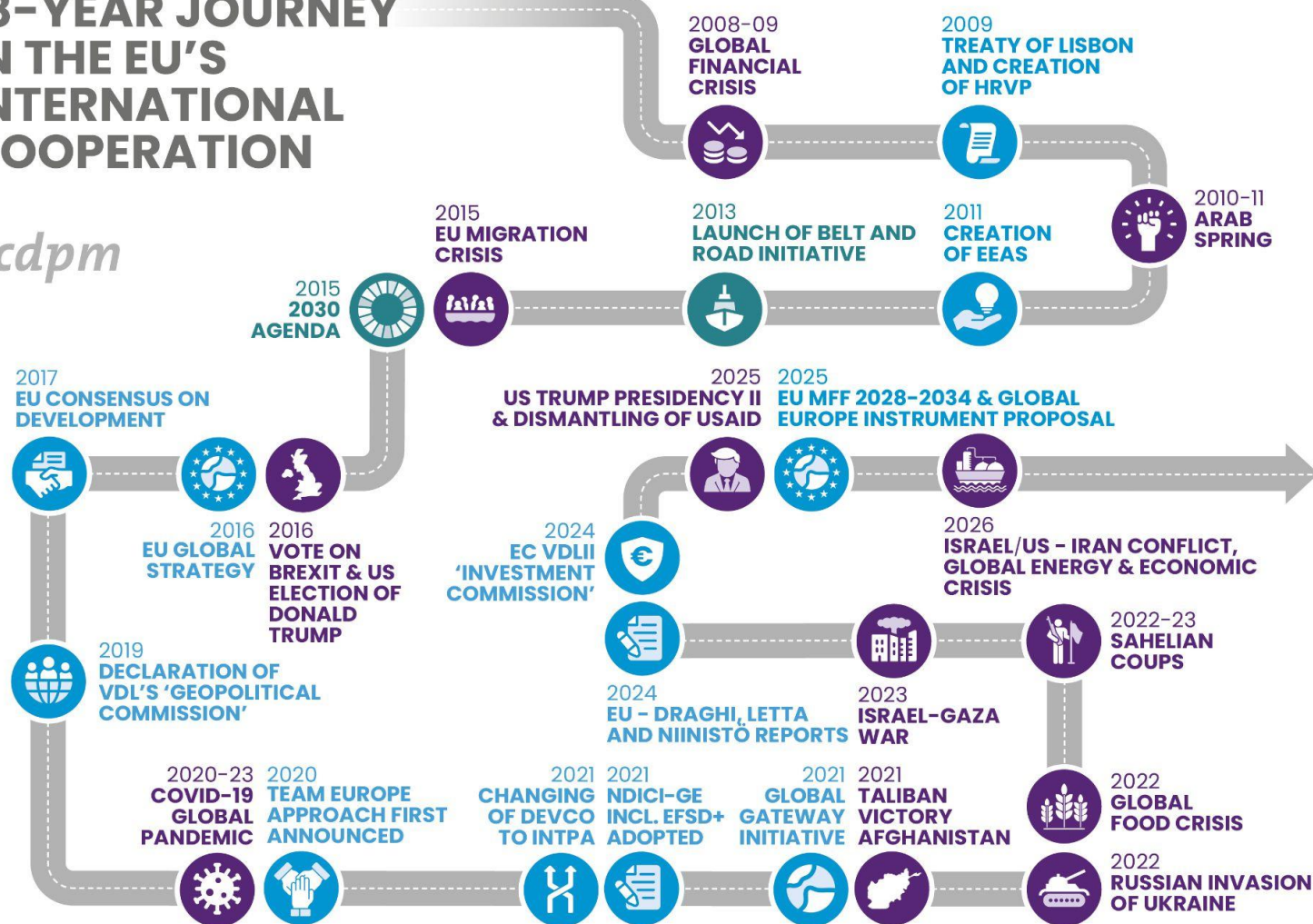
The future of European development cooperation is attracting growing attention as the drivers of change gather pace. The debate now extends beyond traditional development policy circles, bringing together governments, European Union (EU) institutions, think tanks, civil society and partners, while increasingly linking development cooperation to wider European strategic debates (Sherriff and Veron, 2024; Keijzer, 2025; Gulrajani, 2026; Koch and Keijzer, 2026; Schlögl et al. 2026; Jones, 2026a). Development cooperation is also a highly contested area of policy and spending, shaped by deeply held views and long-established practice.

Since the global financial crisis, several global events have demonstrated the volatility of the environment and influenced the direction of European international and development cooperation (Figure 1). The rapid closure of the United States Agency for International Development (USAID) in 2025 brought development cooperation into a much wider public debate (Sherriff, 2025). But this highly visible disruption is underpinned by wider drivers of change that are not confined to the US. Fiscal pressure, changing domestic politics, geopolitical competition and growing scepticism about development cooperation are affecting European countries as well.

Figure 1: The changing European strategic environment for development cooperation

18-YEAR JOURNEY IN THE EU'S INTERNATIONAL COOPERATION

ecdpm



Source: ECDPM

The questioning of development cooperation also comes at a time when Europe's rather positive self-perception of its international cooperation is at odds with how it is perceived by some partners (Tadesse Shiferaw and Di Ciommo, 2023; Veron, 2025). At the same time, the EU is changing how it frames and delivers international cooperation, moving it towards broader and more strategic partnerships. Global Gateway, the EU's external investment strategy, which is largely funded through development cooperation, is moving beyond its initial start-up phase towards a more established model (Bilal, 2026). The scale of European diplomatic energy, financial support and technical assistance directed towards Ukraine also represents a significant strategic shift from past patterns of European Official Development Assistance (ODA) (Sabourin et al., 2026).

Official Development Assistance remains one of the most tangible and important components of development cooperation. ODA from EU institutions and the 27 member states reached €82.5 billion in 2025, constituting 48% of total ODA, although this was a decline from €89.5 billion in 2024 (COEU, 2026a). Globally there was a record annual decline of ODA of 23.1% from 2024 to 2025 (OECD-DAC, 2026a). The ODA from EU institutions and EU member states fell in real terms from 2024 to 2025 by 11.4% (CONCORD 2026). Despite billions of Euros still available for ODA, these substantial resources are very limited in light of the scale and complexity of the challenges facing international development (ICAI, 2026). ODA is also only one part of a much wider set of European and international policies and instruments through which Europe engages internationally.

This paper asks: **What will shape the future of European development cooperation in a changing strategic environment?** It examines how European interests, development objectives and partner priorities are coming together, where they diverge, and what this means for the role of European development cooperation.

The paper argues that development cooperation will increasingly operate within a wider European strategic agenda. This creates opportunities for more coherent European action, but also sharper tensions between European interests, development objectives and partner priorities. The task is therefore neither to insulate development cooperation from wider European interests nor to absorb it entirely into them, but to manage these relationships while retaining the distinctive assets and purposes of development cooperation.

The paper draws on recent research and analysis produced by ECDPM and its partners, including work prepared for the Irish Presidency of the Council¹ of the EU

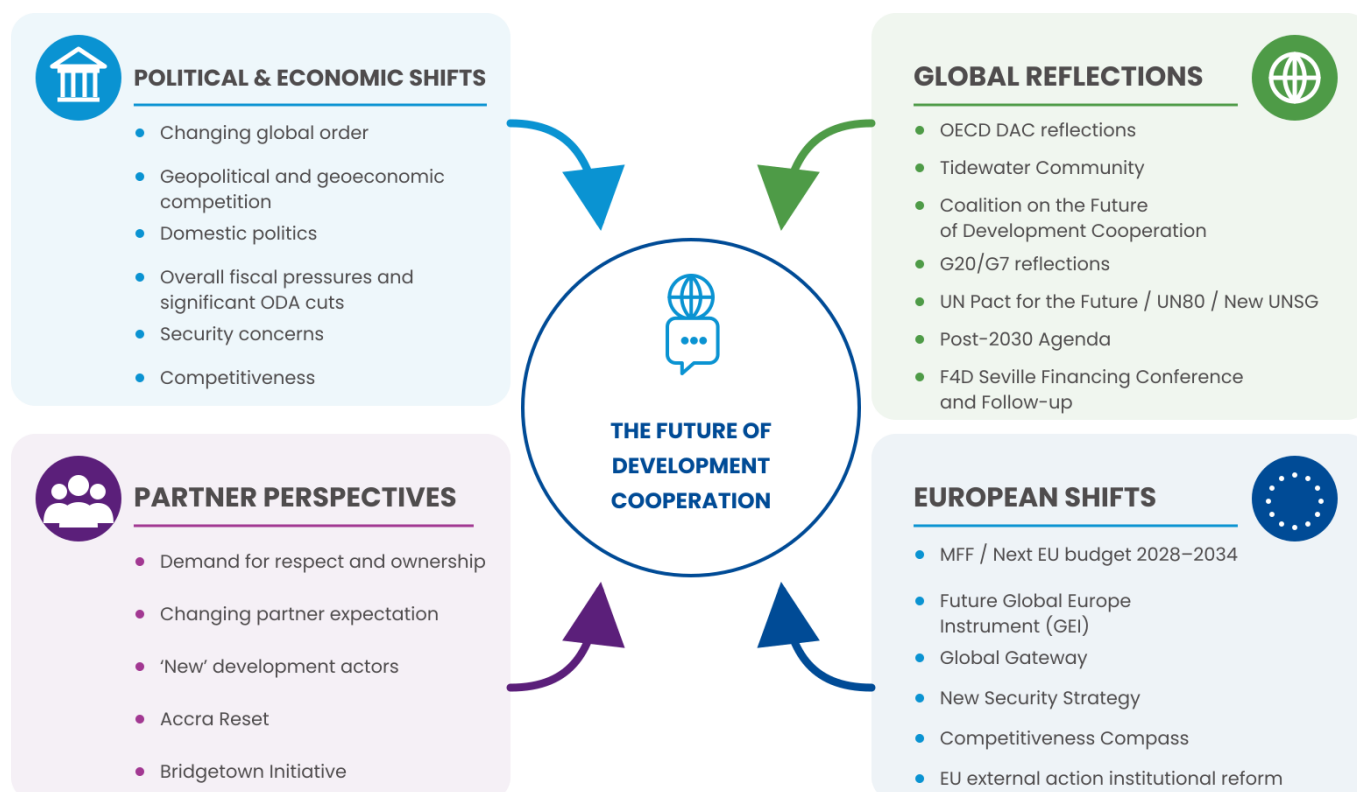
¹ An earlier version of some of this analysis was presented to the Council of the European Union's Working Party on Development Cooperation and International Partnerships (CODEV-PI) on 6th July 2026.

and presented to CODEV-PI on 6 July 2026 (COEU, 2026b). It deliberately takes a broad perspective, bringing together dynamics that are often discussed separately to consider how they may shape the future of European development cooperation.

2. Why is this discussion about development cooperation happening now?

The future of European development cooperation has been an ongoing discussion, but over the past two years momentum has gathered. What is different today is the convergence of several sources of pressure and opportunity for change (Figure 2), making this a particularly consequential moment (ECDPM, 2025).

Figure 2: The convergence of four dimensions



Source: ECDPM

These developments are mutually reinforcing. Changes in the global order are affecting domestic politics across Europe and beyond, while fiscal pressure and changing political priorities have contributed to significant cuts in ODA in many donor countries, coupled with much greater acknowledgement and angst about geopolitical and geoeconomic competition.

The EU is also undergoing significant institutional and financial change. The next EU multiannual financial framework 2028–2034, the future Global Europe instrument, Global Gateway, the EU’s approach to fragility and resilience, and debates around security and economic competitiveness, are creating openings to reconsider the role and architecture of development cooperation (Jones et al., 2024; Jones, 2025; Teevan and Bilal, 2023; Hauck and Desmidt, 2025; Veron, 2026).

At the same time, a number of official, semi-official and privately launched reflections are responding to these political and economic shifts. These include G7/G20 discussions on development and international financial architecture (Fattibene, 2026), OECD-DAC (2026b) and Tidewater discussions (Lithuanian Development Cooperation, 2026), the Coalition on the Future of Development Cooperation (Future of Development Cooperation Coalition, 2026) and debates around the post-2030 agenda (Sherriff, 2026a). There are also reflections within some European foreign ministries, including the Netherlands and Norway (See for example Sjoerdsma, 2026, and Norwegian Ministry of Foreign Affairs, 2026).

Partner countries are also questioning existing approaches. They are demanding greater respect and ownership, challenging aspects of the current global order and seeking more equitable forms of cooperation. The growing unpredictability of development finance has added to these concerns. New initiatives have also been launched by partners seeking to reshape the international cooperation landscape, including the Bridgetown Initiative (Bridgetown Initiative, 2025), the Accra–Marrakech Agenda (V20, 2023) and the more recent Accra Reset (The Chancery of the Accra Reset, 2026). These reflect demands for greater agency and ownership, reform of the international financial architecture, and cooperation better aligned with the priorities and circumstances of developing countries.

These shifts are also changing how European cooperation is perceived and experienced. Research in Kenya and Cameroon found that the EU’s move towards more strategic international partnerships was not yet fully reflected in practice, while raising questions about how changes in priorities and financing modalities were communicated and implemented with partners (Sabourin et al, 2023)². More recent perspectives from Africa, Asia and Latin America point to a similar tension between the EU’s own conception of its role and how it is perceived by others, including concerns about top-down approaches, insufficient consultation and the gap between European rhetoric and delivery (Veron, 2025).

² For further partner perspectives, see ECDPM’s podcast series EU development policy shifts in practice: Voices from Africa (Hunter et al, 2024).

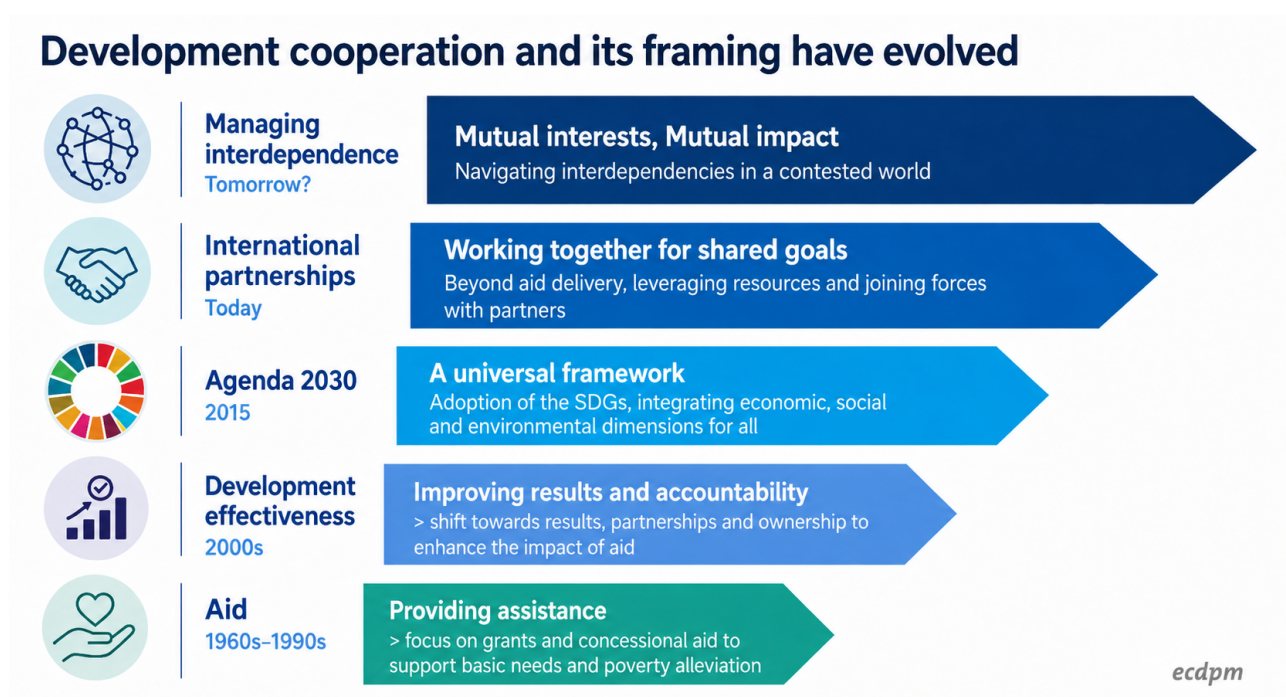
Critiques of what development cooperation has achieved, or failed to achieve, have also become more prominent in Europe, the US and throughout the Global South, increasingly reaching beyond specialist development communities into wider public and political debate.

The rapid development of artificial intelligence (AI) and robotics could reinforce several of these trends, affecting productivity, labour markets, competitiveness and the distribution of technological capabilities. Their full effects remain uncertain, but development cooperation will not be insulated from these changes, particularly as digital development, skills and technology governance become more important dimensions of international partnerships.

3. Development cooperation is being rebuilt on existing foundations

Development cooperation has always evolved through the accumulation and reinterpretation of previous agendas rather than through complete rupture. Since its inception, successive international norm setting agendas have shaped both its objectives and practices (Figure 3). The future will likewise be built on what already exists, including its successes and failures, and on prevailing political and economic pressures. Yet the current period may also represent a significant rupture in the role and purpose of development cooperation.

Figure 3: The layers of European development cooperation



Source: ECDPM

Each of the agendas shown in Figure 3 emerged from particular circumstances and remains contested. European development cooperation in the 1960s to 1990s was often framed as part of a comprehensive cooperation and partnership agenda, but was also deeply affected by Cold War geopolitics and colonial legacies (Frisch, 2008). The development effectiveness agenda of the 2000s sought to improve development results, accountability, partner countries' ownership and alignment to their agendas and systems, although implementation was uneven. Its principles nevertheless remain embedded in development cooperation, albeit often more rhetorically than in practice.

Agenda 2030 and the Sustainable Development Goals continue to frame significant parts of Europe's international cooperation, although their influence has diminished since 2015 (Sherriff and Veron, 2024). More recently, the language of international partnerships has become more prominent, reflecting a desire to work beyond traditional aid delivery, leverage resources and respond to partner priorities while also being more explicit about European interests. Whether this represents a necessary evolution or a departure from the spirit of development cooperation remains contested (Bekele, 2026).

The emergence of geopolitical rifts has exposed how integrated economies and societies have become after decades of globalisation. Rather than an advantage, some see mutual interdependence as a liability. Yet, both Europe and its partners face challenges that cannot be managed independently (ECDPM, 2026 forthcoming). Major inequalities remain, and countries' ability to respond is shaped by their economic and political circumstances, but no country will escape the need to manage interdependencies. This has major implications for the future of development cooperation.

These approaches should not necessarily be seen as successive stages in which one replaces another. Elements of each continue to shape development cooperation.

4. Europe and partners are changing

Europe and its partners are changing simultaneously, but not necessarily in the same direction.

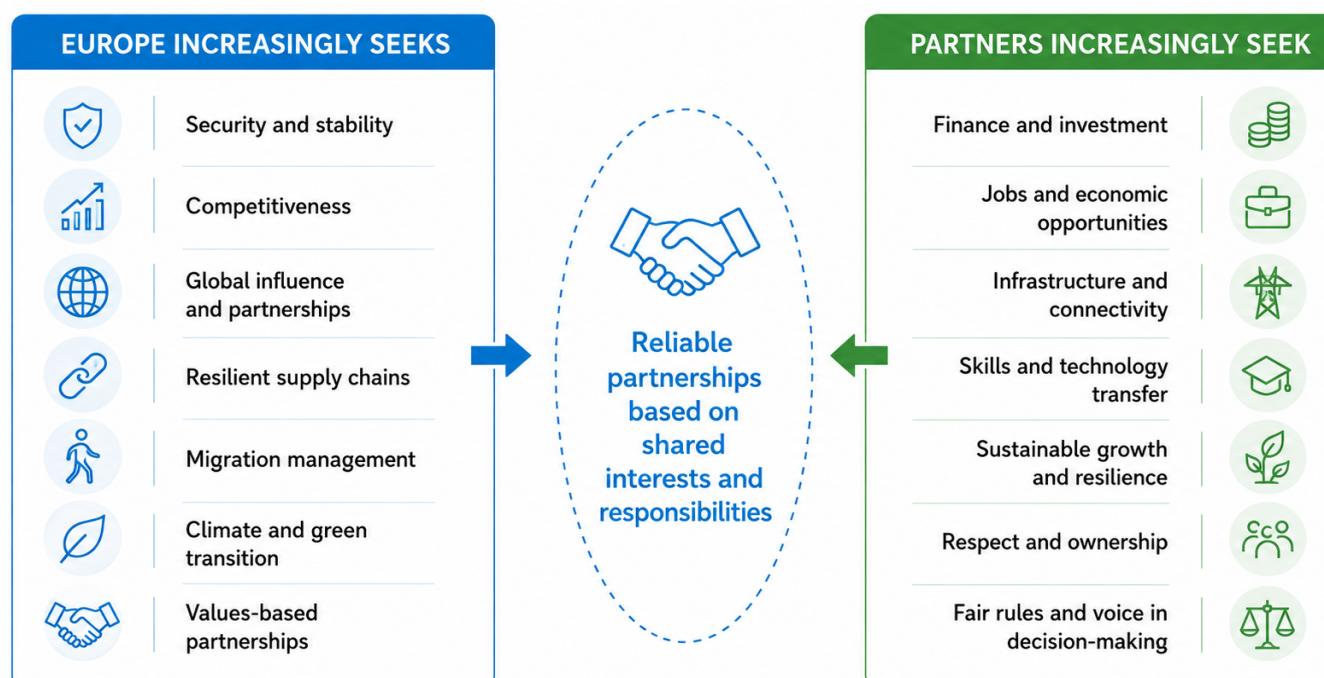
While countries in the Global South/developing countries and emerging economies have long articulated many of the demands they increasingly raise today, such as fairer participation in the global economy, consistent application of international law, more voice and representation in the multilateral system, changes in the global political and economic landscape have given many of

them greater leverage to pursue these demands and more alternatives through which to do so. The availability of other models for international cooperation, especially emerging from other developing countries and China, has not only enlarged the scope of financing, but also shown that different partnership models are possible (Di Ciommo et al, 2024).

At the same time, European actors have become more open about what they want from international cooperation. Development cooperation is increasingly expected to contribute to objectives associated with foreign policy, economic interests, security, investment and geopolitical positioning. The process is not uniform across European countries and EU institutions, with significant divergences in the extent to which they are willing to openly pursue objectives beyond traditional development goals through development cooperation and ODA.

While Europe often speaks of reliable partnerships based on shared interests and responsibilities, European and partners' expectations and realities do not necessarily coincide (Figure 4). This creates a fundamental challenge for partnerships.

Figure 4: Europe and partners are changing simultaneously



Source: ECDPM

The future of development cooperation will therefore significantly depend on where these expectations converge, and where they do not. This makes listening, negotiation and genuine political dialogue increasingly important. Partnerships

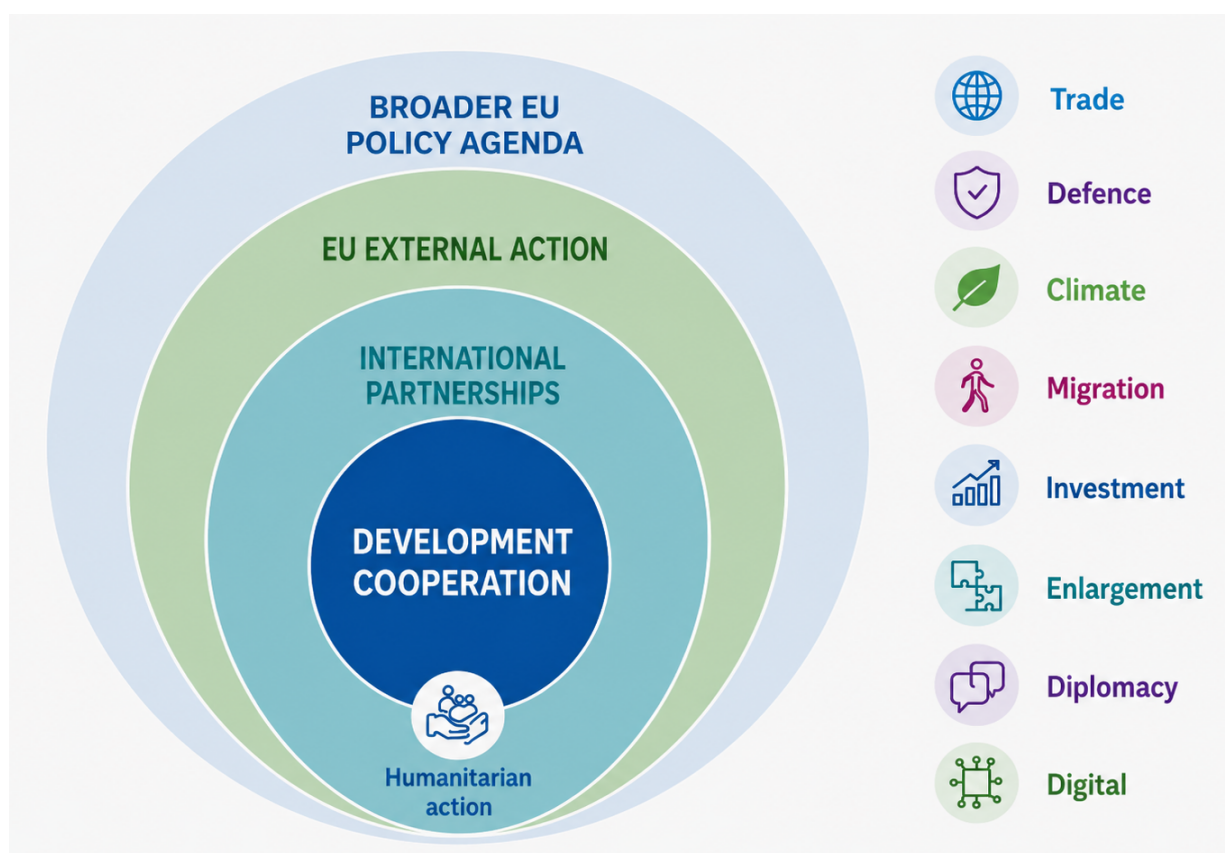
are unlikely to remain credible if consultation is used simply to validate a pre-existing agenda.

5. Development cooperation within an interconnected European policy landscape

Development cooperation was always part of the EU's wider external action, but what was once a more distinct area of policy and action is now intimately connected to a much wider set of policy priorities (Figure 5).

Global Gateway is an obvious example: it brings together development finance, investment, infrastructure, trade, connectivity, climate and geopolitical considerations. The future multibillion Euro, Global Europe instrument and the next Multiannual Financial Framework (MFF) will further shape these relationships. While this creates significant opportunities for greater synergies, it has also made administering EU development cooperation much more complicated with impact difficult to assess (Hauck et al, 2024).

Figure 5: The expanding EU policy ecosystem within which development cooperation sits



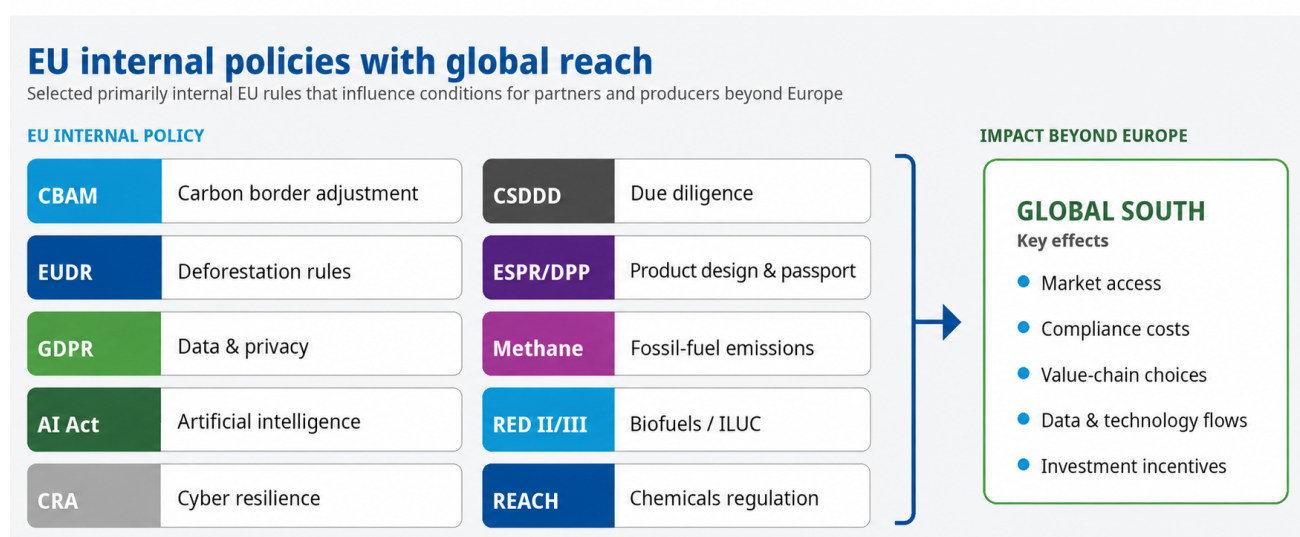
Source: ECDPM

EU internal policies increasingly have an external dimension. Climate policy, industrial policy, energy security, digital policy, migration, economic security and supply-chain resilience are increasingly being framed not only in terms of their effects within Europe, but also in relation to Europe's external interests and relationships, including with developing countries. They can affect partner countries and generate new demands for external engagement. This represents an important change in the relationship between internal and external policy objectives. Efforts to promote Policy Coherence for Development have long recognised that EU internal policies can affect partner countries (European Union, 2019; Tondel et al., 2024). Increasingly, however, internal policy objectives are also creating new reasons for the EU to engage externally.

As Figure 6 illustrates, this broader relationship between internal and external policy objectives is generating new demands for action beyond Europe³. Climate and carbon policies, for example, can affect partner country exporters and create demand for adjustment support, technical assistance and investment (Medinilla, 2025); critical raw materials strategies depend on relationships with producer countries; and economic security, digital and technology policies increasingly require international cooperation (Karkare, 2025). Internal policy priorities are therefore becoming a driver of EU external action in their own right. This can happen in different ways. In some cases, the EU deliberately uses external action to pursue an internal objective, such as strengthening critical raw material supply chains or building international technology partnerships (Karaki, K., Muscat, S. and Teevan, C. 2026). In others, an EU internal policy has consequences for partner countries that require a response through EU external action, such as helping exporters adapt to new climate or sustainability requirements. In both cases, development cooperation may be called upon to support objectives that originate beyond development policy itself.

³ Ursula von der Leyen's (2024) Mission letter to Kaja Kallas noted *"You will ensure that Europe engages and responds to the concerns of those partners impacted by European legislation"* as one of the objectives to the High Representative for Foreign Affairs and Security Policy.

Figure 6: EU internal policies beyond development cooperation



Source: ECDPM; illustrative selection of 10 policy areas

If development cooperation increasingly operates at the intersection of internal and external EU priorities, greater coherence may create opportunities for stronger European action. But it can also make development objectives harder to identify and protect. It also raises a more fundamental question: who determines the priorities that development cooperation is expected to deliver? The relevant actors are no longer only development and foreign policy institutions, but may include those responsible for trade, industry, energy, climate, digital policy, migration and economic security, alongside member states, financial institutions and private-sector actors. This raises questions about how competing priorities are weighed and who ultimately sets the direction of EU external action. As more policy areas become involved, the role of political leadership in setting priorities may become more important.

6. Managing the emerging tensions

European development cooperation increasingly sits at the intersection of different objectives and interests. These are not necessarily incompatible, but neither should their alignment be assumed. There are clear opportunities for greater synergies, but also real tensions and trade-offs (Figure 7) that need to be acknowledged and actively managed, at both the strategic and operational levels. European geo-economic interests and development objectives sometimes reinforce each other, but in other cases they do not.

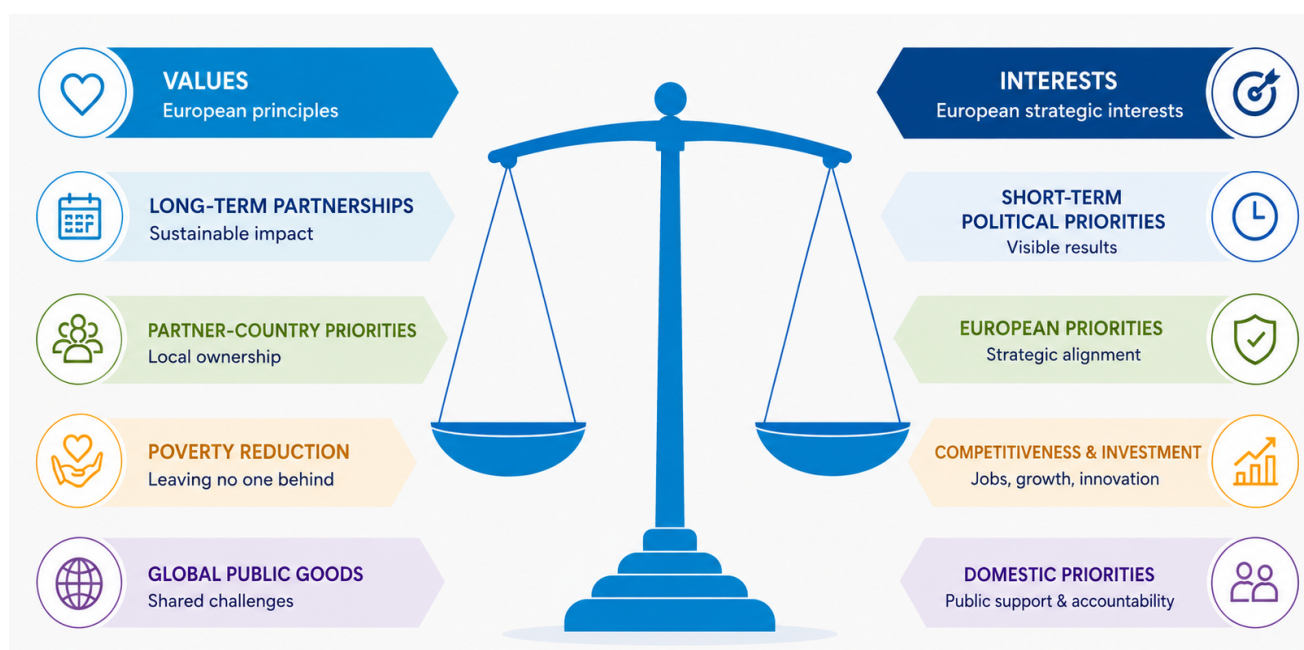
The term 'European interests' is used here broadly. These interests are not always clearly defined or shared across EU institutions and member states, and may

include geopolitical, economic, security and domestic political priorities. Their relative importance therefore needs to be examined in each context, rather than assumed to form a single European interest.

The Lobito Corridor illustrates how these interests can reinforce each other. European interests in infrastructure, investment and critical raw materials overlap with development objectives around regional connectivity, trade and economic transformation. But the alignment is not automatic: questions about who benefits, how investments are distributed and how local priorities are reflected still need to be addressed (Karkare and Byiers, 2025). The Cameroon case illustrates a different tension: European interests in investment and infrastructure do not automatically align with the conditions needed to deliver development impact. The Nachtigal dam shows how a project can appear strategically attractive while its wider benefits are constrained by weaknesses in sector governance, regulation and institutional reform (Van Damme, 2026). These examples show why the relationship between European interests, development objectives and partner priorities needs to be examined in practice rather than assumed to be mutually reinforcing.

The same challenge is embedded in the design of the future Global Europe instrument, which is expected to support “simultaneously” both sustainable development and EU strategic interests. Reconciling these objectives will require clearer priorities and mechanisms for managing trade-offs between them (Holmqvist and Jones, 2025).

Figure 7: Managing the emerging tensions



Source: ECDPM

As the evaluation of the EU's external financing instruments puts it, European cooperation faces a trilemma between its commitment to partnership and ownership, its values, and the pursuit of EU interests (MacKellar et al., 2024, p. vii). In practice, these tensions raise questions about what European cooperation is trying to achieve, whose interests are involved, which instruments are best suited to deliver them, and what the consequences are for partners.

These tensions are particularly relevant for objectives traditionally mainstreamed across development cooperation but potentially carrying less political weight in a more strategically driven agenda. Gender equality is one example. European development cooperation has built substantial policy commitments and experience around it, but sustaining its political and financial priority may become harder as attention shifts towards geopolitical, economic and security objectives. Detailed analysis has already shown that to make progress on gender the EU would need to be more comprehensive, politically informed and contextually adaptive (Gianesello, S., Sabourin, A. and Sergejeff, K. 2024). It remains to be seen whether the progress in articulating more comprehensive approaches to gender equality mainstreaming such as articulated in successive EU's gender action plans will continue to make progress in this new more interest based approach. This raises questions about how such objectives are reflected in decisions about resources, partnerships and implementation.

Consider procurement in EU-funded infrastructure projects. European pressure to ensure that EU financing supports European firms is increasingly reflected in proposals for stronger 'European preference'. Yet European and Chinese firms are often part of complex and complementary supply chains, and excluding Chinese companies can increase costs or make projects harder to deliver. This creates a tension between supporting European firms and ensuring effective project delivery for partners (Di Ciommo, 2026a, Bilal, S. and Karaki, K. 2026.). A similar dilemma arises in the green transition. China's strength in clean technologies can help lower costs and accelerate renewable energy deployment, but reliance on Chinese technology can also deepen strategic dependencies and put pressure on European industry. Europe therefore faces difficult choices over where to compete, where cooperation may still make sense, and how these choices affect partners' own development and energy strategies (Di Ciommo, 2026b).

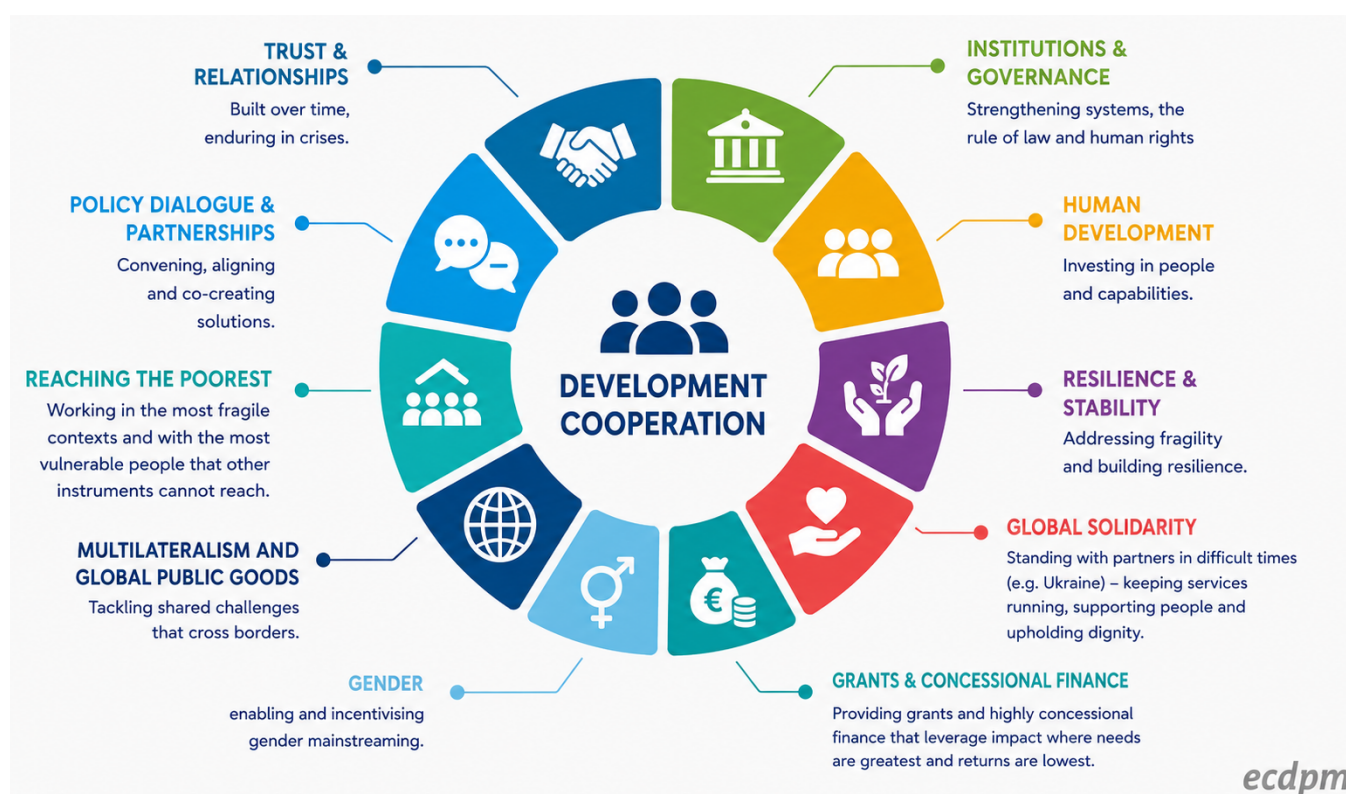
European officials often emphasise synergies more readily than trade-offs, but tensions will become more difficult to ignore as development cooperation becomes more closely connected to wider European interests.

7. The comparative advantage of development cooperation

If development cooperation is increasingly becoming part of a wider European strategic agenda, a fundamental question follows: what does development cooperation bring that other forms of European external action do less well?

Development cooperation has certain characteristics that can support sustained and effective international engagement (Figure 8). These include long-term and consistent engagement with partner countries, sectors and institutions; a strong focus on policy dialogue, institution building and human development, including gender equality; and access to grants and concessional finance, including in poorer and fragile contexts. It also provides an important channel for multilateral engagement, global public goods and international solidarity. Taken together, these characteristics give development cooperation a particular capacity to build relationships, strengthen institutions and support longer-term development outcomes.

Figure 8: The comparative advantage of development cooperation



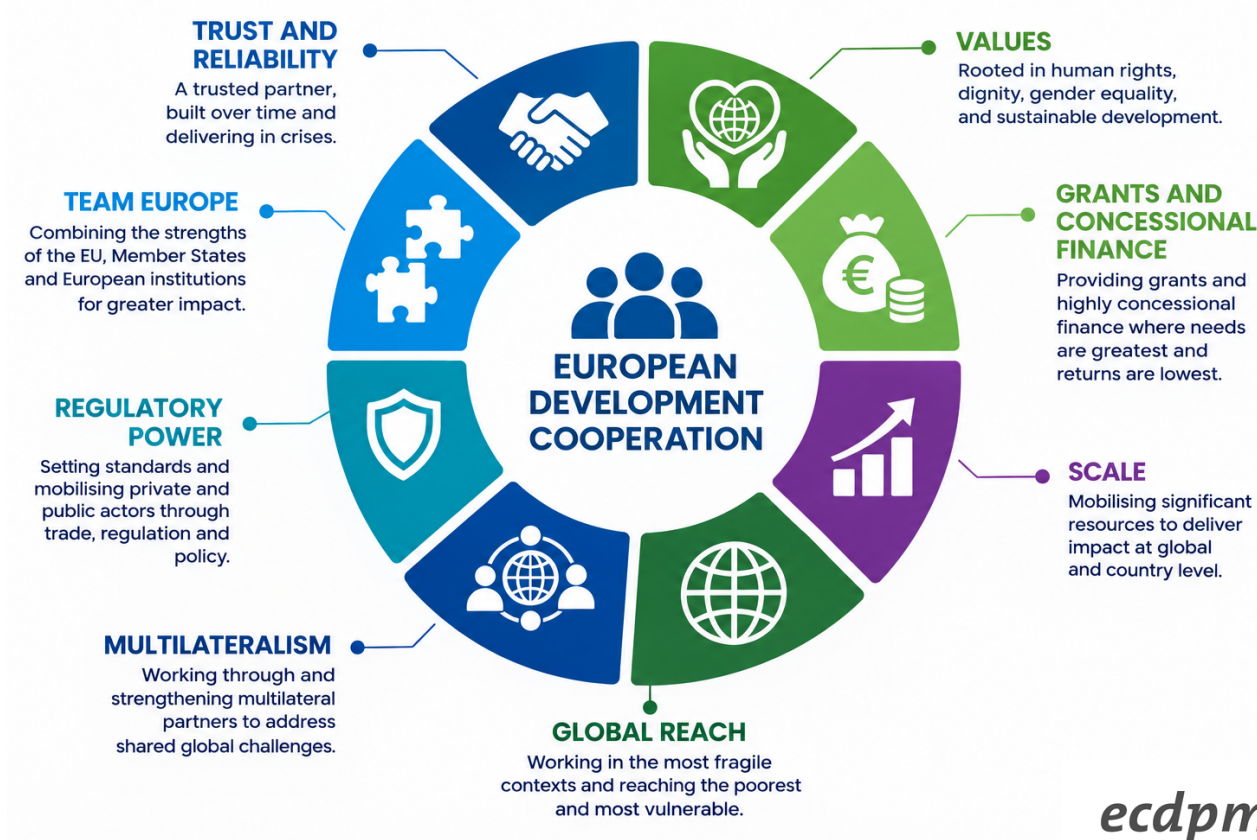
Source: ECDPM

This is also where European development cooperation can have a comparative advantage. The EU and its member states combine a large geographical network,

with long-term engagement, policy dialogue, technical expertise and a broad range of development and external action instruments (Figure 9). Compared with some other international actors, including China, European cooperation also has particular strengths in the institutional and human dimensions of development. China has important advantages of its own, including the speed and scale of infrastructure delivery and competitive access to financing and technology. The United States, even with less development cooperation also still has major assets and capabilities strongly desired by partners. Europe therefore does not have a monopoly on long-term partnerships or development impact, but it does have a potentially distinctive offer that combines finance with institution building, policy engagement and longer-term development support.

These characteristics can also serve wider European strategic interests. Long-term relationships, stronger institutions and human development can generate trust, capabilities and partnerships that remain strategically valuable. This is an important reason to preserve the broader purposes of development cooperation as it becomes more closely linked to European strategic objectives.

Figure 9: The distinctive value of European development cooperation



ecdpm

Source: ECDPM

This raises a more specific question about the added value of EU development cooperation. EU development cooperation sits alongside the bilateral cooperation of member states. Its traditional rationale has been to do jointly what member states cannot achieve as effectively on their own, by pooling resources, expertise and political weight. But aggregation is not the same as added value. As EU and Member State priorities increasingly converge, the EU institutions need to be clearer about what it can bring to the table that member states cannot provide as effectively on their own.

The Team Europe approach provides an important illustration of this challenge. Bringing together EU institutions and Member State resources and expertise can strengthen the European offer, but this depends on how well these different contributions work together and what they achieve for partners.

These questions become more important as development cooperation is drawn into wider strategic agendas. The more it is expected to pursue European economic, geopolitical and security interests, the greater the risk that its distinctive characteristics are diluted. Preserving its long-term, institutional and human development focus can itself strengthen Europe's international position by providing forms of engagement that other instruments and actors do not offer in the same way.

These assets should not, however, be idealised. Development cooperation has sometimes undermined the trust it seeks to build, struggled to deliver sustained results, or failed to reach the poorest and most fragile contexts. European cooperation faces similar limitations: trust and reliability can be undermined by European actions, Team Europe remains difficult to realise in practice, values are selectively applied, and support to multilateralism is uneven. The distinctive value of European development cooperation, and the added value of the EU level, therefore need to be demonstrated in practice rather than assumed.

Despite these caveats, international action to pursue these aims would be greatly diminished without development cooperation. European development cooperation allows the EU to act as a long-term partner, support multilateralism, address the needs of poorer and more fragile contexts, promote values that others may ignore, and operate at a scale and geographical reach that few other actors can match. Even partners critical of Europe's selective approach to human rights recognise that the EU supports them in ways that other regions do not (Veron, 2025).

The challenge is therefore twofold: to preserve what development cooperation does particularly well, and to ensure that EU-level cooperation adds something to

what member states can achieve individually. A significant reduction or dilution of either could carry costs not only for development outcomes, but also for Europe's long-term partnerships and international influence.

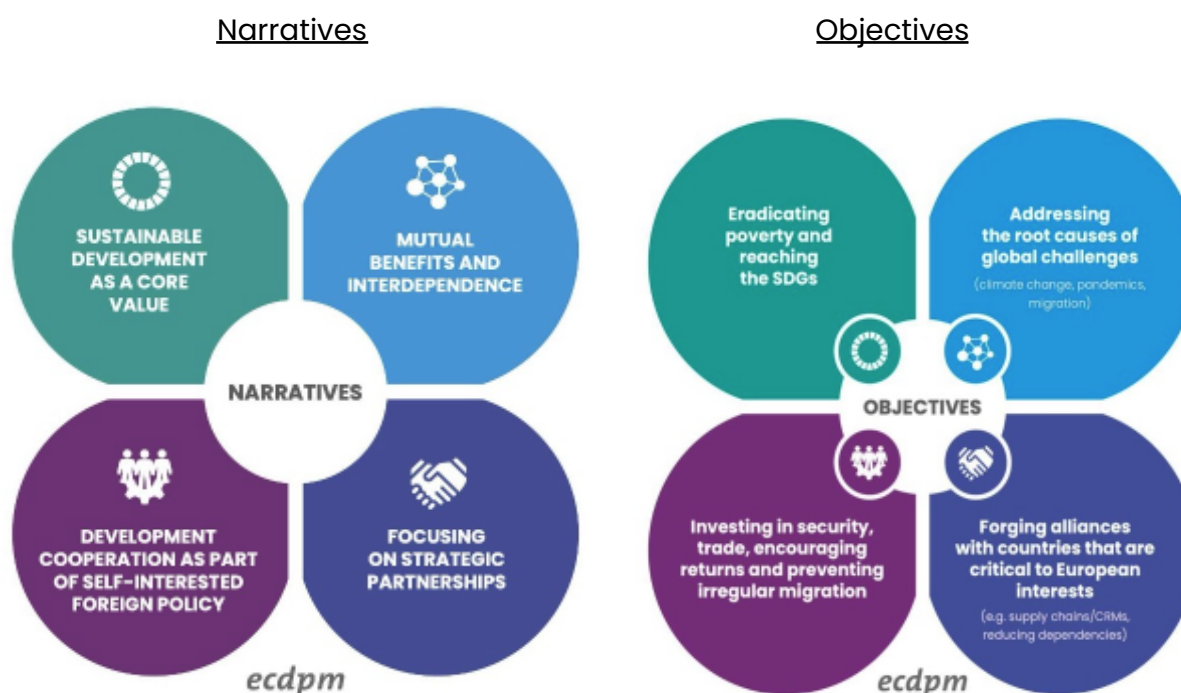
8. Different narratives and objectives in Europe about the focus of development cooperation

The future of development cooperation ultimately depends on domestic politics. The assumption that there is a strong and consistent political constituency for development cooperation has been brutally exposed over recent years. Political support is becoming less certain, while the rationale for development cooperation is also being contested more openly.

For much of Western Europe, a common narrative and objective once prevailed, centred on sustainable development, poverty reduction and international solidarity. Interests were always part of the picture, including historical, commercial and geopolitical interests, but they were often less explicit in the public narrative. This consensus politics has been challenged in recent years, as new political parties and a new generation of politicians have questioned established approaches, including in countries traditionally seen as champions of development cooperation.

As illustrated in Figure 10, different narratives now coexist, ranging from poverty reduction and sustainable development; global solidarity; values and human rights; mutual benefit; strategic partnerships; economic interests; migration management; European competitiveness and investment. These narratives do not need to converge around a single overarching rationale. They can coexist and evolve, while implying different priorities and policy choices..

Figure 10: Different narratives and objectives in Europe about the focus of international & development cooperation



Source: ECDPM

The future of development cooperation will therefore partly depend on whether Europe can make a credible political case for what it is for and what it uniquely contributes to at home as well as abroad. This means making clearer choices about which objectives development cooperation is best placed to pursue and how these relate to wider European interests.

9. From mutual interests to genuine mutually beneficial partnerships

The current strategic direction of EU development cooperation increasingly emphasises “mutually beneficial partnerships”. The term is now used widely in European policy discourse, but its meaning and contours remain unclear (Sumner and Klingebiel, 2026). Its appeal is understandable: few would argue against cooperation that benefits both sides. Yet this broad and positive framing can obscure the more difficult questions of whose interests are being pursued, how benefits and costs are distributed, and where power imbalances and trade-offs lie. Partners bring different priorities, bargaining power and expectations of what a partnership should deliver. The gap between this idealised framing and practice is important (Figure 11). It reflects the broader trilemma facing European cooperation: reconciling partner ownership and partnership, European values and

European interests is difficult precisely because these objectives will not always point in the same direction (MacKellar et al, 2024).

Figure 11: From mutual interests to genuine mutually beneficial partnerships – idealised version



Source: ECDPM

Mutual interest should not become an assumption. It requires more than simply identifying areas of overlap. It warrants careful examination of whose interests are involved, how they align, where they diverge and how trade-offs are managed. It also requires asking “whose interests are put on the table first” and how competing interests are negotiated in practice.

In practice, the EU may define its interests first and then seek areas of alignment with partners, creating a gap between the language of partnership and how it is experienced. This has implications for how European cooperation is programmed: if partnerships are to be genuinely mutually beneficial, partner priorities and perspectives need to shape decisions from the outset, rather than being accommodated after European priorities have been defined. Ensuring this requires greater attention to the principles and approach of programming, alongside more open dialogue with partners and civil society.

Yet making “mutually beneficial partnerships” the overarching principle of development cooperation risks losing some of its distinctive added value. As other comprehensive studies have noted, “Partners are quick to detect overpromising, especially when objectives are presented as fully aligned even when trade-offs are obvious on the ground...” (Schlögl et al, 2026.). Mutually beneficial partnerships are undoubtedly necessary for Europe, but they cannot be achieved through development cooperation alone. A more comprehensive approach to strategic dealmaking is needed across the EU (Medinilla et al., 2025).

There is nothing inherently wrong with partnerships that have a strong transactional component. The challenge is to distinguish negotiated exchanges that form part of a broader and durable partnership from relationships reduced to short-term exchanges or narrowly defined European objectives.

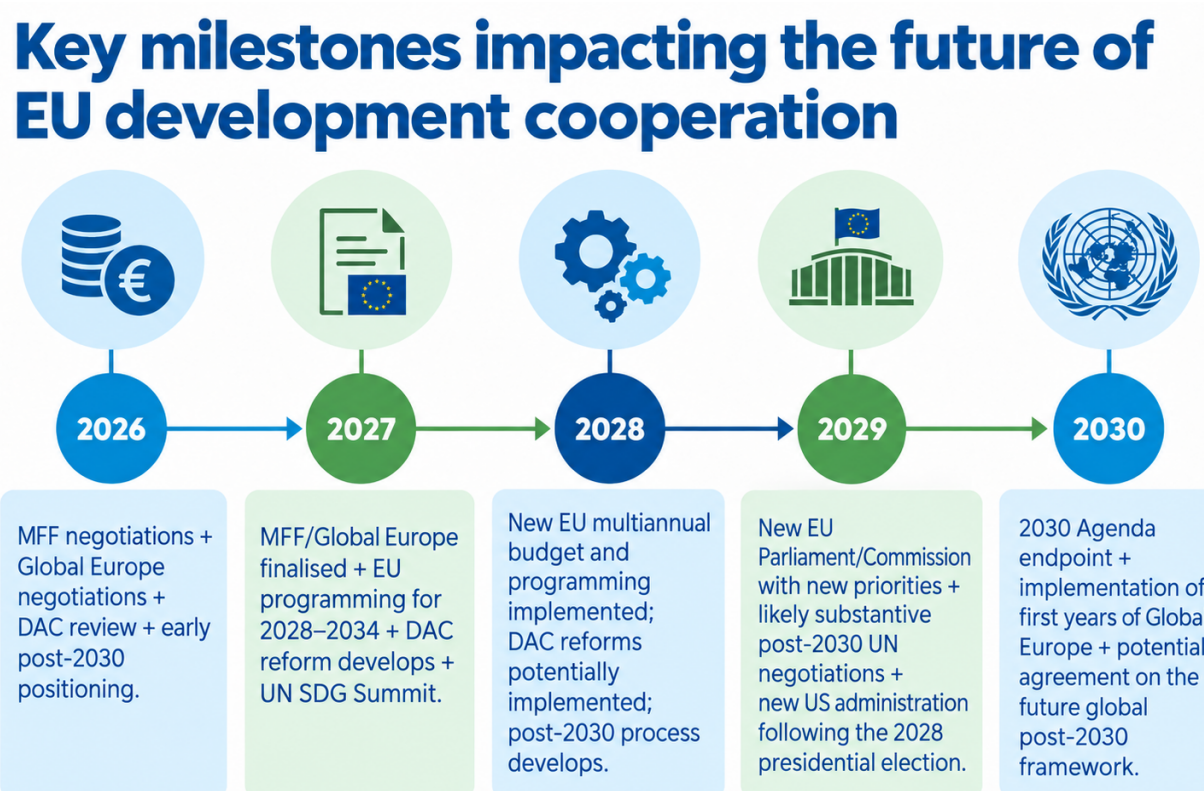
10. Looking forward: Ten factors that will shape European development cooperation⁴

European development cooperation involves a complicated architecture of formal and informal actors, with decisions negotiated among member states, EU institutions and international partners. Despite successive reforms and numerous rebrandings, much of this institutional architecture remains rooted in arrangements established over several decades. Moreover, EU decision-making remains quite siloed despite the rhetoric of greater strategic coherence. The European External Action Service (EEAS) is a case in point. Created following the Lisbon Treaty to strengthen the coherence of EU external action, it now faces renewed questions about its role and relationship with the Commission and member states (Foy, 2026; Vinocur and Barigazzi, 2026; France and Germany, 2026). New efforts to reshape the architecture of EU external action began again in summer 2026, but it remains to be seen how consequential they will be (Sherriff, 2026c).

Against this institutional backdrop, the next five years offer several political and policy milestones, but in themselves they will not determine outcomes. Several decisions over the next few years will have particularly important implications, including the outcome of the MFF and Global Europe negotiations, the DAC-OECD review, major trade and partnership agreements, and the debate on the post-2030 global development agenda (Figure 12). These processes will shape not only resources, but also the political and policy framework within which European development cooperation operates.

⁴ Some of the ideas in this section were first developed in Sherriff 2026b.

Figure 12: Key political and policy milestones, 2026–2030



Source: ECDPM

As the move from "development policy" to "international partnerships" continues across Europe, we identify 10 factors likely to (re)shape EU development policy in the coming years.

› 1. Geopolitics and geoeconomics matter

The political reality that geopolitics and geoeconomics will shape EU development policy is now difficult to contest. The Council of the European Union and European Parliament draft positions on the future Global Europe Instrument 2028–2034 confirm that (Jones, 2026b). What remains contested is what strategic and operational choices should follow from this reality. As Europe's position and interests are affected by a changing geopolitical and geo-economic environment, these choices will also shape the future direction of development cooperation. In particular, how much should geopolitical considerations influence development priorities, partnerships and resources? Where should development cooperation support broader European interests, and where should it retain a distinct purpose?

› 2. Domestic politics and economics matter more

The last decade has demonstrated that in many European countries and the EU institutions the pendulum now swings much further than it once did, particularly towards pursuing self-interest more openly. Pressure on public budgets from ageing populations, lower productivity, (de)industrialisation and increased defence spending reinforces these political shifts. A new generation of politicians may also have fewer historical connections and interests beyond Europe than some of their predecessors. The future of development cooperation will therefore be shaped not only by changing external circumstances but by whether it continues to command sufficient political support within European political and budgeting processes.

› 3. EU-level cooperation will become more important

The relative importance of EU cooperation vis-à-vis bilateral European cooperation is likely to increase, driven by the need to act together and at scale, but also by budgetary realities. EU spending on international partnerships may prove more stable than many bilateral programmes, while member states may be required to channel more resources through EU instruments as domestic pressures on ODA increase. This could strengthen the collective European offer, but not necessarily create a collective European strategy. Whether member states can move beyond simply treating the EU as an ATM for national priorities and agencies, and instead develop a genuine collective strategy, remains to be seen. For partners, engaging with the EU as a collective actor will therefore become more important. The Team Europe approach has strengthened this collective dimension, but bilateral relationships remain important, leaving partners to engage with both a collective European offer and individual Member State interests. Future enlargement will further change the political and economic composition of the EU and could reshape both its external priorities and the balance between EU and Member State interests

› 4. The EU needs a clearer vision for its development policy

The European Consensus on Development was agreed in 2017 but its political uptake and relevance has faded. The question is what broader vision of development and international partnerships should now guide European action. This goes beyond the Global Gateway and investment support logic: European development cooperation is now expected to contribute to a growing range of objectives from poverty reduction and global public goods, to migration, investment, multilateralism and democratic values and human rights albeit not at the same level. These objectives are not necessarily incompatible, but there is no clear hierarchy between them. Without a stronger political settlement around

these competing objectives, development cooperation risks becoming a vehicle for whichever priorities are most politically salient at a given moment. The Global Europe instrument takes on significance beyond its budgetary envelope. As the EU's main financial instrument for development cooperation, its design will also help define the policy framework for the coming period. The negotiations therefore matter because they provide an opportunity to clarify a policy agenda that has not been substantively renewed across the main European institutions and member states for almost a decade.

› 5. Global Gateway cannot become the whole story

The Global Gateway and its investment-driven approach, while important and strategically necessary, cannot credibly provide the organising framework for the full range of European development cooperation, even through a more expansive "360 degree" approach. Particularly because Global Gateway 2.0 is centred around European interests (Bilal, 2025). There is also an inherent risk, if the entire future of the EU's development cooperation rests on an as yet unproven success of the EU's external investment strategy. Poverty reduction, fragility, social sectors, governance and the Humanitarian-Development-Peace nexus, require a place within a broader framing of development cooperation. There is also a risk that the focus on investment and flagship projects crowds out less visible but essential dimensions of cooperation, including local governance, institutional capacity and ownership. Evidence on the involvement of local and regional authorities in Global Gateway illustrates this challenge (Sabourin, 2025). A more durable approach will require greater clarity about what Global Gateway is for, what it cannot do, and how it relates to the wider purposes of development cooperation and European trade and economic interests globally.

› 6. Development principles and values still matter

Values remain important to how Europe sees its role in the world and to expectations of what European engagement should stand for. They also shape how European cooperation is perceived by partners, including its approach to issues such as human rights, even as Europe remains vulnerable to accusations of double standards. In this sense, values are not separate from interests: they are part of the kind of international actor Europe wants to be, the relationships it builds and the international environment it seeks to shape. Development principles such as ownership, accountability, transparency, gender equality and a focus on poverty also remain important to the credibility and effectiveness of European cooperation. The shift in emphasis towards wider strategic objectives may, however, affect the political visibility and priority given to some of these objectives. The challenge is to recognise where values and interests reinforce each other and to be honest about where they do not.

› 7. The EU toolbox needs to match its ambitions

Few EU officials or partners would disagree that there is a gap between European ambitions and the instruments available to deliver them. The next MFF offers an opportunity to address this mismatch, but reform efforts remain constrained by vested interests and wider political battles (Jones et al., 2025). For example, it would make sense to use the European Competitiveness Fund to support the EU's international investment ambitions, rather than load them into a Global Europe Instrument that is supposed to be 90% ODA (Bilal, 2026). Yet institutional silos, fragmented budgets and procedural constraints make it easier to put new objectives into existing instruments than to build a financing architecture around what the EU is actually trying to achieve. The risk is that the EU ends up with tools that meet neither the needs of its external investment agenda nor those of development cooperation and meaningful partnerships. Overloading the next financial framework with investment guarantees could also leave less financing for other forms of cooperation. The toolbox inside partner countries will also change as EU Delegations are restructured, affecting how responsibilities and resources are organised at country and regional level and, ultimately, how European partnerships are developed and delivered.

› 8. Development policy will increasingly be judged as part of the EU's wider offer

Political leaders and other stakeholders in partner countries do not compartmentalise EU engagement into neat policy boxes, instruments or branded initiatives. Their assessment of Europe is shaped by the overall relationship, including Europe's historical baggage and colonial legacies. Partners assess Europe as a whole, including its trade, migration, climate, security, technology and investment policies, as well as its positions on human rights, democracy and wider political relationships. Major trade and partnership agreements are likely to become another channel through which development cooperation is linked to wider European interests. The EU's emerging agreements with major economic and geostrategic partners, including India and Brazil, combine trade, investment and development cooperation dimensions (Kamath et al., 2026). Such deals may make strategic sense in a small number of priority relationships, but they also raise questions about the allocation of development resources: whether and how ODA should be used as part of broader European bargains, and what this means for countries that are less strategically important to Europe. If the EU wants to build genuinely mutually beneficial partnerships, it will need to consider not only what it offers through development cooperation, but how its wider policies affect the interests and choices of its partners. Many

partners have options, and the idea that the successful redefinition of European development cooperation and the search for mutually beneficial partnerships can be defined by Europe and Europeans alone is gravely mistaken. > **9. What happens in Ukraine will continue reframing EU development cooperation**

Ukraine is existential for the EU (Sabourin et al, 2026). The trajectory of the conflict and its eventual resolution will shape not only political priorities but also European spending decisions for much of the next decade. The scale of resources, including ODA, and political attention directed towards Ukraine is unprecedented in recent EU external action. This has implications for Europe's bandwidth and engagement with other regions, particularly Africa. Even if the conflict subsides, its economic, political and security consequences are likely to continue shaping EU external action for years to come. Ukraine will therefore remain both a major priority in its own right and an important factor shaping the space available for European development cooperation elsewhere.

> **10. Multilateralism is becoming more contested, but more important**

The multilateral environment is becoming more contested, with geopolitical fragmentation, competing interests and declining trust putting pressure on existing institutions and rules. At the same time, many of the challenges facing development cooperation, from climate change to global economic governance, require collective action. For Europe, this creates a tension between pursuing its interests and investing in multilateral approaches that depend on broader cooperation. The EU will need to be more strategic and clearer about where and how it wants to use its collective weight, and what it is prepared to invest in multilateral solutions even when the immediate benefits for Europe are less clear. Its engagement in the post-2030 Sustainable Development Agenda will be an important test case. Agenda 2030 remains the closest thing to a shared global framework for development cooperation, despite its declining political salience in some countries. Europe will need to decide how much political investment it is prepared to make in shaping what comes next (Sherriff, 2026a).

Under-investment in the process could weaken both the prospects for a meaningful global development framework and Europe's influence within it. If the EU abdicates its responsibilities in multilateral processes, it will pay a geopolitical as well as developmental price.

11. Conclusion: Managing interdependencies will become the defining challenge of the era

European development cooperation will increasingly operate in a world of overlapping and interconnected challenges. Climate, security, migration, technology, trade, energy and development can no longer be treated as separate domains. Few EU policy papers deny these interdependencies; translating that recognition into coherent action is much harder. Many developing countries and emerging economies have long understood these interdependencies and how difficult they are to manage. The EU is only now fully grappling with their implications.

For European development cooperation, this means connecting to other instruments and policy areas, while retaining the distinctive assets and purposes that give it value. Its ability to manage these relationships in ways that build trust, strengthen partnerships and negotiate genuine mutual interests may ultimately matter more than any particular policy framework or funding instrument.

The next decade of European development cooperation may ultimately be defined less by how much money Europe spends, or by the branding of its flagship initiatives, than by how well it manages interdependencies and negotiates interests with its partners. This needs to be done both bilaterally and multilaterally.

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