

Global Europe: A geopolitical instrument in need of strong development safeguards

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Summary

All cards are now on the table. The negotiations on the European Union's 2028–2034 multiannual financial framework can start in earnest. The proposed Global Europe instrument is becoming the main vehicle for projecting Europe's geopolitical role in the world, while official development assistance remains its main financial component.

Beyond the real governance issues of the instrument already pointed out by the European Parliament and the Council, the core substantive challenge in regulating the Global Europe instrument will be to reconcile the Union's new interest-driven geopolitical ambitions with treaty-based commitments to a rules- and values-based international order with the United Nations Charter at its core.

It is therefore important to clarify who determines what the EU's real, long-term geopolitical interests are and under what conditions development cooperation can contribute to their realisation. As a potential source of EU soft power, it is only important if it is effective in fighting poverty and creating decent jobs, focuses on sustainable impact, remains untied, inclusive and accountable and contributes to peace, democratic consolidation, the rule of law and human rights.

EU priorities such as economic security, migration, climate, biodiversity and health security are legitimate. The challenge is to clarify exactly what is at stake and then pursue it in ways that reinforce, rather than undermine, development effectiveness, since this is ultimately what gives the EU's external action its credibility and long-term geopolitical value.

A credible and effective pro-poor development policy should not conflict with Europe's strategic agenda; it can give that agenda legitimacy and long-term geopolitical weight.

Policy context: what is at stake in the MFF negotiations

The 2028-2034 multiannual financial framework (MFF) negotiations can start: the [Commission](#) proposed a single, integrated, Global Europe instrument (GEI), seeking maximum flexibility and minimal oversight; the [European Parliament's development committee \(DEVE\) and foreign affairs committee \(AFET\)](#) called for stronger development safeguards; the [Council](#) seeks greater political steering and accountability. Among member states, the budget hawks (and net contributors) seek reductions, while the net beneficiaries of regional cohesion funds want to protect them, and the European Parliament asks for budget increases to live up to the challenges of an increasingly chaotic and unpredictable world. And DEVE insists that external financing remains anchored in poverty reduction, human rights, democracy, rule of law and the Sustainable Development Goals.

In its [MFF negotiating box](#), the starting shot of the budget negotiations, the Cyprus presidency has tried to balance these pressures, including by trimming the overall proposal slightly while protecting politically sensitive areas such as migration and humanitarian aid.

But the direction of travel is clear. As [Jones \(2026\)](#) puts it, Global Europe is “evolving from a development instrument with geopolitical ambition into a geopolitical instrument with developmental safeguards”. The desire for simplification is no longer questioned, and Global Europe has now become the almost exclusive instrument projecting the Union in the world. That is why this shift is not only perfectly understandable but even desirable. Yet it creates a double policy risk. The first is that flexibility may lead to a reactive, crisis-response-driven instrument rather than an instrument allowing for building predictable, long-term strategic partnerships. The second is one of consistency. If Global Europe is increasingly conceived as a geopolitical instrument, the rationale for maintaining a 90% ODA target should be made explicit. This target reflects the legacy of NDICI and its predecessor instruments, notably the EDF and DCI, which were overwhelmingly ODA-compliant. So far, the EU budgetary authorities haven't questioned the target; in which case, development safeguards therefore cannot become secondary; otherwise, the EU risks losing its credibility by undermining one of the main sources of its external influence.

The central policy question is now clear: can Global Europe develop a geopolitical, long-term interest-driven foreign policy while preserving the conditions that give development policy strategic value?

Why official development assistance still matters

Development assistance is usually justified by four motives: solidarity, economic interest, political influence, and the provision of global public goods such as climate protection and pandemic prevention.

The latest available [Eurobarometer data](#) (based on fieldwork in spring 2023) confirm that support for development cooperation at the EU level continues to receive overwhelming support from EU citizens, primarily for ethical reasons, to tackle poverty. [Humanitarian aid](#) most clearly expresses the moral motive and must remain guided by humanity, neutrality, impartiality, and independence, even though it also contributes to security, helps address fragility and epitomises the defence of rules- and values-based multilateralism. [Economic justifications](#) are weaker: if the aim is to support European firms, targeted domestic industrial policy and [export finance](#) are usually more direct, effective, and transparent tools than official development assistance (ODA) and should be kept separate.

The global public goods argument is stronger but still needs to be qualified. Donor countries have an interest in first reducing (much higher) emissions and vulnerabilities at home; ODA is most justified when essential sources of global public goods are in partner countries and when investment there produces benefits that cannot be achieved otherwise. Protecting the Congo Basin, one of the last major net carbon sinks, is a clear example.

The strongest but (in the past) least avowed rationale for ODA is political: development cooperation as a powerful source of EU soft power, complementing its (public) diplomacy in its different - multilateral, economic, cultural, scientific, climate - dimensions, its trade policies and hard security engagements. But the paradox is that it works only when it is perceived as meeting its ethical justification, is untied, coordinated, aligned with partner priorities and visibly effective in reducing poverty, supporting sustainable growth, and creating decent jobs. The policy implication is straightforward: ODA serves the EU's influence best when it remains genuinely developmental. Even where the most vulnerable on the surface do not offer any '[strategic interest](#)', investing in them remains ethically but also geopolitically important in light of the fight for the hearts and minds.

This makes priority-setting decisive. As [Bilal and Karaki \(2026\)](#) note, the MFF documents list multiple objectives but do not rank them. Without a clearer hierarchy and decision-making framework, flexibility risks becoming arbitrariness, and (apparent) trade-offs between development, migration, climate, security, and commercial objectives become opaque.

Principles that should guide priority setting

Article 21 of the Treaty on European Union (TEU) provides a first indicative hierarchy of objectives. It requires EU external action to be guided by democracy, the rule of law, human rights, human dignity, equality, solidarity, the UN Charter, and international law. The [2016 Global Strategy](#) strengthens the same point: *“Our interests and values go hand in hand; we have an interest in promoting our values in the world”*.

Defending a rules- and values-based international order and the battle for the hearts and minds of the citizens in the Union’s partner countries are therefore not secondary concerns but the EU’s overarching geopolitical interest.

But for a geopolitical EU, credibility is essential and depends on consistency between what it promotes abroad and how it acts.

Development cooperation contributes to that goal. Article 208 of the Treaty on the Functioning of the European Union (TFEU) states that poverty reduction is the primary objective of development cooperation. The gradual integration of all countries in the world economy through the dismantling of barriers to trade becomes a means to that end.

By showing solidarity with developing countries and by supporting poverty reduction, resilience, sustainable growth and decent job creation, democratic consolidation, the rule of law, human rights, and accountable governance, the Union contributes to realising its geopolitical ambitions by also helping address instability, conflict, forced displacement and irregular migration, environmental degradation, and the loss of trust in democratic governance.

Strategic priorities: where safeguards are needed

Global Europe frequently invokes the EU’s “strategic interests”, but not every priority mentioned is equally strategic. Policymakers should distinguish between long-term geopolitical interests and short-term political pressures, between geoeconomic security and ordinary commercial promotion. Without that distinction, instruments and objectives become muddled.

Three recurring agendas dominate Global Europe and Global Gateway: economic security, migration and global challenges, especially climate, biodiversity and health. Each can be legitimate, but each must be assessed against the EU’s treaty commitments and against the development effectiveness criteria that make external action credible.

1. Economic security

Strategic autonomy and economic security have become central since COVID-19 and Russia's invasion of Ukraine exposed the fragility of critical supply chains and the [weaponisation of trade](#). Yet, just as food security does not imply food self-sufficiency, the objective should not be autarchy, but reducing overdependence on a small number of suppliers, products and trade routes in strategic sectors. The [strategic urgency of import diversification](#) depends not only on the monopsonistic nature of supply, but also on the geopolitical alignment of the supplying countries, the substitution elasticity and the forward-linkage intensity of the products identified as strategic.

For critical raw materials, the answer is not a new scramble for commodities but partnerships that support reliable access to essential inputs, whether supplied in their unprocessed or more processed form. Such partnerships become really mutually beneficial (and distinctive from other partners) when they can guarantee responsible extraction, local processing, technology transfer, skills and decent jobs. This is where economic security and development can converge: partner countries gain value creation, while the EU gains more dependable, diversified and politically sustainable supply chains.

Africa is central to this agenda because of its critical raw materials, renewable energy potential and young labour force. But near-shoring or friend-shoring will work only if accompanied by technological transfers and investment in skills, infrastructure and supportive logistic services, public utilities, accountable governance and a predictable business environment. To be convincing, this requires full [compliance with the OECD Due Diligence Guidance](#) for responsible supply chains of minerals from conflict-affected and high-risk areas, and therefore strengthening rather than weakening the Union's Critical Raw Materials Act and concrete measures against those who ostentatiously or secretly break it.

A 360-degree Global Gateway approach to accessing critical raw materials can be developmental. Yet a formal European preference in procurement beyond the increased use of qualitative rating criteria to create a more level playing field with a low-cost, low-quality Chinese offer would be [counterproductive](#) if, driven by short-term commercial interests, it turns concessional finance into disguised support for European firms, increases the costs and reduces the developmental impact of the funding. Development funds should create fair, high-quality and sustainable long-term partnerships; funding for industrial policies supporting

European business should come from competitiveness and export-finance instruments under the internal headings of the MFF.

2. Migration

[Migration is politically salient but strategically sensitive](#), seen primarily as an internal security challenge rather than as an opportunity in an ageing continent increasingly facing labour shortages in critical sectors such as health, hospitality, construction or agriculture. The MFF documents refer to a comprehensive approach, yet the agenda is often driven by domestic pressure to reduce irregular migration and focuses on border control, return, readmission, and reintegration rather than on legal pathways for (circular) migration in shortage occupations and in research.

Hard conditionalities such as visa restrictions and reduced access to concessional funding can undermine EU interests when they are imposed on fragile countries where migration is linked to poverty, demographic pressure, environmental degradation exacerbated by climate change, repression, and conflict. Without credible legal pathways and sustained investment in resilience, the Union's migration policies will alienate public opinion in partner countries, weaken partnerships, and worsen the root causes it claims to address.

Similarly, the (costly) externalisation of the Union's return policies through the creation of 'return hubs', a euphemism for detention centres for rejected asylum seekers in third countries with a dubious human rights record, tarnishes the EU's values-driven external policy.

The EU should prioritise stability, decent livelihoods, rights-based cooperation, and legal mobility over defensive migration conditionality. This is more likely to reduce long-term displacement pressures and sustain partner-country trust and the Union's geopolitical interests.

3. Global challenges

Even if the Green Deal is a bit out of fashion these days, climate change, biodiversity loss, and health security are not optional add-ons but global challenges with clear geopolitical consequences. The Council's proposed reintroduction of references to the Paris Agreement and the Kunming-Montreal Global Biodiversity Framework in the Global Europe regulation, and DEVE's call for climate targets in the MFF documents, therefore matter.

Africa is the least responsible for climate change, but at the same time, the least resilient to climate change. Once the principle of common but differentiated responsibility is accepted, [global fairness](#) in climate action is no longer a moral category but becomes a strategic imperative. The EU should support decarbonisation in partner countries without exporting environmental, social or economic costs to them, while simultaneously enabling local value creation. Access to clean energy through initiatives such as Mission 300 – including if that implies the import of China-made solar panels to access the ‘last mile’ – is more important for development, security and credibility than protecting every short-term European commercial interest.

The same applies to instruments such as the zero-deforestation regulation and the carbon border adjustment mechanism. Their objectives, stimulating the green transition while ensuring a level playing field between internal and external producers, are defensible, but their conception phase should have required a more active consultation process, and implementation must be accompanied by timely support measures and differentiated timelines so that they accelerate sustainable transformation rather than appear as hidden protectionism.

Biodiversity protection should also be framed as an economic and security imperative. Environmental degradation, such as in [the Lake Chad Basin](#), one of the regions worst affected by climate change and the least prepared for it, accelerates climate change, undermines agriculture, fuels land-use conflicts and violent extremism, and increases migration pressures. Community-based ecosystem protection, sustainable agriculture, forest management, and eco-tourism can support livelihoods while reducing adaptation costs.

Health security deserves similar priority. Ebola, COVID-19, mpox and other zoonotic diseases show that early detection and prevention are far cheaper than a late response. Decentralised health systems, research capacity, and rapid containment mechanisms therefore serve both development and global security.

Delivery test: aid effectiveness and accountability

If Global Europe is to be mutually beneficial, “mutual benefit” must be defined through inclusive processes, not unilaterally by EU institutions or in consultation with partner governments only, whose legitimacy is often questionable. The [Council’s return to the Paris-Accra-Busan principles](#) is therefore important: ownership, alignment, results-orientation, transparency, mutual accountability, and inclusion should become operational requirements, not rhetorical references.

[Global Gateway has so far struggled to meet these standards](#). Criticism from external observers points to weak ownership, limited transparency, unclear results frameworks, and insufficient accountability. This is not a technical weakness; it reflects the risk that a short-term (commercial) interest-driven approach sidelines the very practices that make development cooperation legitimate and the Union geopolitically credible.

The Council's call for a 360-degree approach is therefore important. Transformative infrastructure must be combined with regulatory and governance reforms, institutional strengthening, skills development, conflict sensitivity, and social cohesion. [In fragile contexts](#), this requires sustained human and financial resources, not ad hoc crisis management.

Africa: the key test of EU geopolitical credibility

Africa is the key test case. The Council conclusions on Global Gateway recommend a focus on sectors where the Union has a comparative advantage and partners' demand is strong: the Commission's digital transformation and secure and trusted connectivity, renewable energy, transport corridors, health systems, education and research, but also agri-foods, water and sanitation. It is not so sure the EU has such clear comparative advantages in all these sectors of intense - low cost (and sometimes strongly subsidised) - competition. But it has a distinctive offer to make, the "European touch": infrastructure embedded in governance, accountability, rule of law, human rights, skills, public services, and institutional capacity. Digital, energy, transport, health, education, and research investments will matter only if they reach people, reduce exclusion and support local value and decent job creation.

Beyond operational priorities, Africa is central to the EU's geopolitical objective of defending a rules- and values-based international order. African states represent more than a quarter of UN General Assembly's votes, and many remain reluctant to align in great-power rivalries. The [USA's 'extractive' approach to Africa](#) and China's Africa fatigue offers a unique window of opportunity for the EU to reposition itself. But the EU will not win support through USA-type short-term interest-driven, transactional approaches or China-type indifference to democratisation processes and human rights, but by demonstrating that its partnerships reduce poverty, deliver jobs and security, and promote accountability, open societies, inclusivity and respect. The [promotion of democratic accountability](#) cannot be rhetorical but must be a political priority, embedded in the various funding mechanisms from the start.

Afrobarometer surveys show over and over again that citizens prioritise decent jobs and security while also demanding more effective democracy and accountability. Global Gateway can become a genuinely mutually beneficial partnership only if it responds to these aspirations through an inclusive, conflict-sensitive 360-degree approach. In the long term, winning the trust of citizens, and in particular of the urban youth, the future of the continent, matters as much as securing agreements with passing governments.

Well-designed development cooperation for long-term geopolitical credibility

A credible pro-poor development policy does not weaken an interest-driven foreign policy; it strengthens it. Well-designed development cooperation is an invaluable soft-power instrument, a contribution to strategic autonomy and security, and a practical response to climate, health, and migration pressures.

In line with Jones (2026), Bilal ([2026b](#)) observes that the Global Gateway instrument has evolved from an instrument with development impact as its primary objective towards an instrument with greater emphasis on geostrategic and geo-economic interests, implying that the development approaches have to be better aligned with these interests and all instruments in the external actions toolbox better coordinated for a coherent 'whole-of-government' approach. But Article 208 of the TFEU confirms the need for coherence for development, not the other way round. Where there may appear to be a trade-off between development and geostrategic objectives, the reason is most likely because the EU deviated from its primary development objective and/or those geostrategic objectives have not been clearly identified and are mixed up with lower-level economic objectives.

The choice for Global Europe is not between values and interests, but between short-term transactionalism and long-term geopolitical credibility.

Global Gateway can only become the main implementation strategy of Global Europe if it clarifies the strategic objectives of each intervention in light of the EU's true geopolitical interests, if it fully integrates the 360-degree approach focusing on governance, inclusivity and sustainability, if it can be held accountable, and if it leaves room for complementary actions, notably in situations of fragility.

The simplification and flexibility inherent in the new Global Europe instrument must, therefore, be matched by clear and effective development safeguards.

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