



By: **Ian Bremmer**

# China sees a global leadership vacuum and is moving to exploit it



Don't mistake the **photos** of Chinese President Xi Jinping alongside Russian President Vladimir Putin and North Korean leader Kim Jong-un at Beijing's Victory Day parade for a new world order.

Xi is in no position to lead one. But he does see a global leadership vacuum and he is moving to exploit it.

The real story from last week wasn't the military hardware rolling through Tiananmen Square. It was the guest list for the preceding Shanghai Cooperation Organization (SCO) **summit**, the largest since the organization was founded in 2001.

Faced with a unilateralist White House whose policies change as fast as US President Donald Trump's mood, more than two dozen world leaders – overwhelmingly from Asia and the Global South – turned up at Tianjin with one thing in common: a shared desire to diversify away from the United States.

In what I call the “G□Zero world” – where no country is willing and able to set global rules, and where the US is increasingly seen as not just unpredictable but unreliable – the premium on optionality has gone through the roof.

The distinction between unpredictability and unreliability matters.

Unpredictability can be tactically useful for keeping adversaries off balance and galvanizing allies to do more.

NATO is stronger today than it was before Trump first came to office, partly because his unpredictability (along with Putin's full-scale invasion of Ukraine) pushed the Europeans to increase their defense spending and add two new members to the alliance.

But unreliability has the opposite effect, driving everyone – friends included – to hedge their bets.

## The US has become unreliable

Across trade, technology, and security, Trump has imposed sweeping tariffs, withdrawn from formal agreements, and pressured even close allies into narrowly transactional negotiations.

In the near term, countries are playing defense, handing the White House “wins” – non-reciprocal concessions here, tariff carve-outs there – to avoid further escalation.

But they are also seeking alternatives – new trade ties, financial infrastructure, and supply chains – to reduce long-term exposure to US policy changes.

China has taken note and is billing itself as a steady hand that is committed to multilateralism, long-term deals, and “noninterference.”

At Tianjin, this message was explicit: we will stand by our agreements; the US will not.

**Even governments that do not necessarily buy into China's global vision, and that would rather work with America, are looking for options to boost their resilience**

The message is landing, not because others believe that China has suddenly turned into a benevolent hegemon, but because it is the only player with the scale and the policy consistency to anchor a long-term hedging strategy now that the US has become unreliable.

Xi used the SCO summit to pitch a sovereignty-first multipolar alternative to the Western-led order, to criticize Trump's “unilateral coercive measures,” and to add a new Global Governance Initiative to his set of branded platforms.

The summit's joint **statement** echoed his talking points, and members agreed to create yet another development bank to facilitate transactions in national currencies rather than the dollar.

While these deliverables were predictably modest, the optics were potent: even governments that do not necessarily buy into China's global vision, and that would rather work with America, are looking for options to boost their resilience.

## India and China remain strategic adversaries

India is the most consequential example. Prime Minister Narendra Modi made his first visit to China in seven years, meeting Xi (and Putin) in Tianjin at a time when the US-India relationship is becoming more adversarial and volatile.

While the thaw with China had been quietly building since last fall, a personal rift with Trump, who has slapped a 50% tariff on Indian exports to the US, pushed Modi to hedge more strongly. India is signaling that it has options to help it withstand US pressure.

Of course, China won't replace the US as India's primary strategic, economic, and technological partner.

India and China remain strategic adversaries with border disputes and competing interests across South Asia – from Bangladesh and Tibet to the Maldives – and Indian public sentiment toward China is still unfavorable.

Moreover, China's tight security relationship with Pakistan, like India's deepening ties with Japan and the Philippines, continues to breed mutual mistrust.

Modi went to Japan before arriving in Beijing, and he skipped Xi's military parade.

### The India-China thaw will remain narrow and opportunistic

India was the only SCO member that refused to endorse China's Belt and Road Initiative in the summit's communiqué, signaling that it still prioritizes its relations with the West.

Positive as it is for global stability, the India-China thaw will remain narrow and opportunistic. There will be some selective economic easing and some prudent border de-escalation, but no strategic pivot.

Similarly, American unreliability makes the SCO marginally stronger, but it doesn't turn it into the China-led equivalent of NATO or the G7.

## A reliable partner

Though China exhibited formidable convening power last week, its capacity to marshal collective action remains limited.

Its global initiatives on security, development, and AI suggest that it is better at branding than at delivering concrete outcomes.

The SCO has outgrown its original counterterrorism and climate remit, but it hasn't found a unifying purpose.



*For the US, the solution is obvious: become a reliable partner again*

It is a sprawling club whose mismatched interests – from India-Pakistan antagonism to Central Asian suspicion of Moscow – will keep coordination shallow.

Diplomatically, China still punches consistently below its economic weight. In conflicts beyond its neighborhood, its actions still tend to lag its rhetoric.

The SCO will be more vocal, but no more relevant on the biggest security questions. It won't impact Ukraine or Gaza anytime soon.

Even so, the incremental creation of new global plumbing – including a new SCO bank (if well-funded) operating alongside the Asian Infrastructure Investment Bank and the BRICS New Development Bank, more national-currency settlement, anti-sanctions mechanisms, and more South-South coordination – could matter down the line.

These are small steps, but they will make diversification away from the US easier over time, and harder to unwind later.

American unilateralism has made the costs of overreliance unmistakable, handing China an obvious opening. All it needs to do is present a simple contrast: at least we are consistent. In a G-Zero world, that counts more than perfection.

For the US, the solution is obvious: become a reliable partner again. Refrain from imposing surprise tariffs on allies and withdrawing from painstakingly negotiated deals, and show more follow-through on commitments that will outlast a news cycle.

Until then, other countries' pursuit of optionality will continue, and the world's center of gravity will keep inching eastward.

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