

SOCIAL PERSPECTIVES

Spring 2026



Has the West Lost the Future?

Cover Art: Albrecht Dürer, Melencolia 1. Engraving, 1514.

Editors' Note

Speaking in front of the World Economic Forum in January 2026, Canadian Prime Minister Mark Carney declared a rupture in the world order. The multilateral institutions, collective security arrangements, and stable financial systems that had underpinned decades of global integration, Carney said, were beginning to unravel. But what one commentator termed the “gospel of Mark” did not describe the unraveling of globalism as such; rather, it outlined the unraveling of a specific world order, built and maintained by the loose entity known as “the West.”

This inaugural issue of *Social Perspectives* turns to the question that Carney was grappling with: has the West lost the future? Is the political ethos of the West—loosely defined by a commitment to pluralism, globalization, and liberal government—no longer a winning formula for facing the challenges of our changing world? More basically, is the alignment between the U.S., Canada, Europe, and a few Asian countries that has defined global power balances, spanning diplomacy, trade, and military cooperation, still a given?

In the following pages, these questions are examined across three essays and two interviews with academics, journalists, and policy experts. These contributions make no effort to construct a single definition of the West or specify a concrete future. Instead, working across political theory, history, and economics, they parse out the most consequential challenges facing the West as a group of states and as a set of principles. They situate Prime Minister Carney’s speech in history and in potential futures.

Philosopher Andre Santos Campos lays out a defining feature, and growing problem, of the Western practice of democracy. In its commitment to equality and popular legitimacy, democratic governance has trouble addressing long-term issues in a consistent, productive manner—an acute problem in the face of systemic challenges such as climate change and shifting power dynamics spurred by China’s ambitious economic growth and

diplomatic outreach.

Historian Stephan Kieninger turns to a conflict that has fractured Western visions of a liberal world order more than any other: the Russia-Ukraine War. He situates the war in misaligned perceptions of the end of the Cold War between Russia and the West, reminding us that what many perceive as an irrational conflict stems from far more complex circumstances than the lunacy of one man.

Climate and economic policy researcher Heidi Scarth dives into this question of rational thinking—core to the basic organization of Western society—by discussing the current U.S. administration’s tenuous relationship with the concept of truth. The U.S.-grounded global economy, she argues, is ill-prepared for a willful disconnection from fact-based policymaking. Other countries should prepare accordingly.

Our interviews turn to the faltering of the West’s hopes and promises, and consider what entities might begin to replace it. David J. Lynch, Global Economics Correspondent for *The Washington Post*, discusses the explosion of globalization following the Cold War and the backlash this global order has faced since. Georgetown University Professor Bulelani Jili examines economic and technological ties between two regions that may come to be the center of global politics: Africa and China.

Taken together, these five pieces illustrate a West that is undeniably under stress—from outside pressures and from the inconsistencies woven into Western political practice itself. We can argue about whether the current moment constitutes a rupture, transition, or aberration. Whatever position we take, the following pages make abundantly clear that the West—if it wishes to remain materially and politically significant—is facing an unavoidable and difficult inflection point.

—*The Editors*

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The West's Democratic Temporal Puzzle and the Future

Andre Santos Campos

Democracies operate on fixed timelines, such as election and budget cycles. These short time constraints help maintain stability and legitimacy, but they also make it harder to avoid an excessive focus on short-term political goals. Authoritarian regimes do not face this same constraint. As a result, when it comes to addressing urgent long-term challenges, liberal democracies can be at a significant disadvantage.

Take the Paris Agreement on the climate as an example. In 2017, two years after the U.S. ratified the agreement, the U.S. administration formally notified the UN of its intention to withdraw. The succeeding administration, elected a year after the withdrawal was finalized, immediately sought readmission to the Paris Agreement, officially rejoined in February 2021, and pledged significant reductions to greenhouse gas emissions. However, before long, the administration that had originally initiated the 2017 withdrawal returned to office and submitted a renewed notice of withdrawal. This succession of policy reversals spanning a mere nine years serves as an illustration of the intuition that long-term commitments in democracies may be fundamentally undermined by the vagaries of electoral politics. What a democratic administration says today about long-term political projects may well fall apart after the next election.

On this last occasion, however, the current

President of the U.S. was determined to overcome this challenge. His administration issued a memorandum announcing its intention to withdraw from both the United Nations Framework Convention on Climate Change (UNFCCC) and the Intergovernmental Panel on Climate Change (IPCC). The implications extend beyond mere withdrawal from an additional climate-related treaty: the UNFCCC was ratified by the U.S. Senate, meaning that any future re-accession will face considerably greater legal and political obstacles than re-adherence to the Paris Agreement. By creating additional barriers to participation in international legal instruments and partnerships concerning climate change, the U.S. administration advances a narrowly national strategy for addressing characteristically global problems—a strategy that crystallizes a particular path dependency towards long-term energy independence, thereby rendering it more difficult for future administrations to deviate from this trajectory.

The same can be said of the current U.S. President's recent active pursuits in foreign policy. Irrespective of one's assessment of his involvement in the internal affairs of Venezuela, Iran, or Denmark, or of the justifications advanced by the administration, it is evident that the varying degrees of U.S. influence over a territory containing the world's largest reserves of oil and gold, over one of the largest, most powerful and populated countries in the Middle East, and over a strategically located territory near the Arctic endowed with considerable rare earths reserves cannot be understood merely as the pursuit of immediate interests to be enjoyed in the present. Rather, these actions are underpinned by the ambition to reshape U.S. engagement in global politics far beyond 2028.

Authoritarian Parallels

We may conclude that the President of the U.S. in 2026 can be characterized as a leader in

pursuit of a long-term strategic vision. This looks like a sound political virtue for any government leader. But, in this instance, the U.S. President is not fundamentally different from non-democratic leaders. Authoritarian regimes are not bound by the temporal constraints that are hard-wired into democracies' commitment to equality. Authoritarian leaders face no temporal puzzle. Figures such as Vladimir Putin and Xi Jinping have consistently advanced strategic futures for their respective states. Xi seeks to position China at the forefront of the global energy transition, whether through paradoxical investment in green technologies while contributing to the rise in carbon emissions or through efforts to control other nations' access to rare earths. Putin aims to reassert Russian influence over territories formerly belonging to the Soviet Union, pursuing this objective incrementally in a process that may unfold over several decades. And even Hitler's aspirations of *Lebensraum* represented a territorial expansionist project intended to secure space for the growth of what the Nazi regime defined as the Aryan race, an imperial ambition central to National Socialist ideology. Hitler's dream was, after all, that of a 1000-year Reich.

This long-term strategy pursued by the current U.S. administration appears to be viable only through the convergence of several factors. Washington's alliance policy (of which the so-called 'Board of Peace' is the most straightforward example) in which the nature of political regimes seems largely irrelevant, allowing for the ready antagonization of liberal democracies while cultivating amicable relations with authoritarian governments, all treated with apparent equivalence. The Supreme Court is composed of life-tenured members, secured by an effectively immovable majority appointed in large measure by the current President—and consequently rendered largely unresponsive to the intimidation of legal norms by executive power. The bicameral legislature appears either forgetful or ignorant of the meaning and purpose of a system of checks

and balances. International legal organizations that had not anticipated their inability to operate without American backing are eroding. In short, the U.S. President's strategic long-term thinking, whether or not it may ultimately prove beneficial for his country, appears to rely on a suspension, if not outright breakdown, of the mechanisms we have grown used to associating with the proper functioning of liberal democracies.

I conceptualize this phenomenon as the 'democratic temporal puzzle': as written in my book *The Semi-Future Democracy*, "since democracies govern for the indefinite future but only by imposing on themselves strict (and often short) time limits, is it possible (both in terms of feasibility and justification) for a democracy to seriously consider and even prioritize the distant future within the temporal confines that make it a democracy in the first place?" Unlike authoritarian regimes, which do not require temporal constraints to legitimize their power structures, democracies are inherently bound by these limits. Should we, then, diverge from liberal and democratic norms if we want to implement long-term political projects that are not subject to the whims of different office holders to address problems that affect all nations (even though not equally)?

This challenge is both political and philosophical, and it is not easily resolved. Consider, for instance, the European Union's steadfast commitment to the values of liberal democracy, of which investment in the Green New Deal constitutes one of the clearest practical manifestations. The EU's member states seek to foster resilient democratic institutions: the highest scores in measures such as those produced by V-Dem and Freedom House are typically attained by European countries. Nevertheless, despite these commitments, European states continue to be drawn into substantively divergent international strategic agendas that hinder the achievement of long-term global objectives, including the reduction of carbon emissions, the eradication

of poverty, and the establishment of an international rule of law conducive to peace. This occurs alongside the rapid spread of non-liberal political currents across the European landscape.

Does this entail that the Western paradigm—insofar as it brings together political communities sharing a common liberal heritage, in which democracy, respect for human rights and peoples' self-determination, mutual security guarantees, and integrated markets play fundamental roles—can address long-term challenges only by sacrificing some of its core tenets? This question is of paramount importance: if democratic societies persist in inadequately addressing problems such as climate change, climate-induced mass migration, accelerated population aging, and the prospect of artificial general intelligence surpassing core human capabilities, there may ultimately be little future in which to exalt the virtues of liberal democracy.

Semi-Future Polity

In my book, I offer a tentative response to the democratic temporal puzzle. I propose linking contemporary liberal democracies to the concept of multitemporal democracy, according to which democratic governance operates across multiple, coexisting temporalities: short cycles associated with legitimacy and extended time horizons relevant to human and material infrastructures, all of which are anchored in continuity with the past. From this perspective emerges the concept of the semi-future polity, which reframes how democracies ought to understand and institutionalize political time. The framework argues that current citizens have objective interests in the future—namely, in the conditions they themselves are likely to inhabit later in

life. Democratic representatives must represent such objective interests in the political arena. On this basis, we can reconfigure core democratic practices of representation, accountability, and policymaking so that democratic institutions become more responsive to long-term interests. This entails expanding the demos to include individuals across all age groups as well as those with representable future-oriented stakes, recalibrating deliberative practices, and introducing new forms of temporal accountability.

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Liberal democracies already possess the conceptual and normative resources necessary for future-oriented governance, provided that they adopt a revised understanding of political time. Within the semi-future framework, long-term policymaking becomes not merely possible but democratically required when grounded in principles of responsibility, reflexivity, and sustained justifiability over time. By incorporating this semi-future perspective, democracies are better equipped to address pressing challenges such as climate change, infrastructural adaptation, and institutional stability, while preserving democratic legitimacy and public accountability.

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The Economic Consequences of a Departure from Truth

Heidi Scarth

Economics, like any other science, is an endeavor to understand the world around us. But unlike the hard sciences, the economy cannot be measured through balancing equations or calculating velocity. Instead, economists attempt, through observations of human behavior and diverse research designs, to discover the “true value” of the subjects they study. As such, economics, and the consequential policy recommendations the discipline produces, is underpinned by trust in the validity of a basic sense of truth. This sense of truth, however, is increasingly buffeted by a barrage of disinformation, attacks on experts, and stark political polarization, begging a necessary question: how much does the dilution of truth affect the economic systems driving basic societal functions?

Economic theories of rational behavior have evolved over time to reflect the discipline’s tenuous binding to the truth. Early theories assumed people had complete information and would, therefore, behave rationally. With the introduction of imperfect information into theory, economists recognized that a lack of comprehensive or factual information could significantly limit individuals’ ability to make rational decisions. Without access to good information, people could make poor economic decisions without

being aware of them.

To reflect this, our understanding of the economy has increasingly relied on what consumers expect to happen and how they perceive economic conditions. In 1936, economists began factoring expectations of inflation into their predictions on future inflation. This approach has been refined over the decades, and today’s economic models emphasize that what people expect to happen—whether it is truthful or not—significantly shapes actual economic outcomes. The incorporation of expectations into economic models reflects the importance of people making decisions based on accurate and truthful information, but acknowledges that this may not always be the case.

However, what economic policymaking does not account for is the willful and intentional eschewing of information and truth that has pervaded the U.S. over the last decade. Economists’ ability to accurately understand and forecast economic trends in the U.S. is hindered by a divided population. When a large portion of the population appears to prefer disagreeing with evidence as a matter of principle, they contradict basic assumptions about rational decision-making and become what could be called “anti-rational” actors. Though individual decisions may not have broad economic impacts, the collective implications of a voting bloc engaging in this behavior can be far-reaching. Just the most immediate example is voter support for punitive tariffs targeting countries that had “unfair trade deficits” with the U.S., despite decades of evidence, including analysis of the previous tariffs enacted in 2018, demonstrating the negative impact of the policies on domestic firms and consumers.

This anti-rational tendency—though it has not been mirrored with the same intensity in other Western countries—will have effects that reach far beyond U.S. borders.

U.S. Policy in a Post-Truth Age

The consequences of a splintering foundation of truth and fact are materializing in a sharp divergence from historical U.S. foreign policy and trade strategies. These consequences include the economics of the tariff schemes mentioned above, and the disregard for Western treaties and norms, such as claiming the U.S. has never needed NATO, trying to acquire Greenland from Denmark, and building closer relationships with adversaries like Russia and China, whose leadership possesses a similarly fragile relationship with fact. This seemingly unpredictable divergence from previous actions creates high levels of uncertainty, not only for the West, but for the entire global economy.

Global cooperation on climate change may be the biggest casualty. The Paris Agreement, signed in 2015 by 195 countries, spurred global action on reducing greenhouse gas emissions. In the decade since, the global clean energy economy has expanded significantly: investment in renewable energy in emerging markets (excluding mainland China) has tripled, low-carbon energy capacity has doubled, and the U.S. and Europe have been global leaders in reducing emissions.

Despite extensive research showing the impact of human activity on the climate, and solutions for ensuring the longevity of our society and the global economy, falsehoods around climate change have drastically changed the trajectory of U.S. climate policy. Reversing the national stance on climate change and emissions reduction policies has led to fewer jobs and slower technological development. Internationally, the reversal has the potential to disrupt global supply chains, slow

global progress toward reducing emissions and increase the potential global impacts of climate change on future generations.

This change does not necessarily spell disaster for the climate ambitions of the rest of the West. While the U.S. reinvests in coal production for “energy dominance”—a policy incoherent with global energy trends—other Western countries have reinvigorated their clean energy ambitions, for example, through market mechanisms and more ambitious climate pledges. The biggest winner, however, is China—Beijing is rapidly outpacing the West on clean energy research and capacity-building.

Domestically, the current U.S. administration has publicly suggested that the next chair of the Federal Reserve may be expected to weaken the Fed’s independence for short-term political gain. These actions reflect the same strain of anti-rationality. There is extensive evidence loss of central bank independence leads to higher inflation, economic instability, and worse outcomes in the long run: Turkey’s central bank, for instance effectively lost its independence in 2019, causing the Turkish Lira to lose value rapidly and leading to severe inflation.

But Turkey’s experience does not capture the potential impact of a loss of independence for the Federal Reserve. The resulting inflation and damage to the dollar would affect not only the U.S., but all countries that use the dollar, countries whose currencies are tied to the dollar, and oil markets that rely on the dollar—especially in the wake of the push for Venezuelan oil this year.

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A Path Forward

This uncertainty suggests that it may be time for countries to build more independent economic infrastructure, so that changes in the stability of the American economic sphere do not impact the rest of the world to the extent that they have in the past. In some cases, this is already occurring. The expansion of oil trade between member countries of BRICS is a reaction to U.S.-controlled global oil markets and an effort to grow economically without relying on the U.S. system. This also connects to the case of climate change above—decreased reliance on fossil fuels can decrease the relevance of the dollar in global oil markets.

In sum, the economic consequences of a departure from rational thinking are not hallmarks of success; they are an inability to address global challenges, an unstable currency, and disrupted trade. These developments will only intensify if economic thinking continues to be driven by a willful divergence from fact.

The question at hand for the West is: how long will countries that have historically benefitted from the current global economic system allow the U.S. to continue towards a departure from truth before disentangling themselves? Will the uncertainty permeating the U.S. economy continue to affect its trade partners and allies, or will these relationships fundamentally break? It may be tempting to regard the American tendency towards anti-rationality as a localized problem. But its effects will be global, and the rest of the world will adjust their own economic ties accordingly.

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Integration, But No Settlement: The West, Russia, and the Post-Cold War Order

Stephan Kieninger

Since 2022, the refrain that Russia's revisionist war in Ukraine emerged from a Western failure to adequately integrate Russia into the post-Cold War order has ricocheted around debates on the war's origins. NATO enlargement and a lack of meaningful involvement for Russia in the prospering international community, advocates of this argument say, planted the seeds of insecurity that grew into the war in Ukraine. But the West's current difficulty with Russia does not reflect the failure of Western diplomacy in the 1990s. Rather, it reveals the limits of what diplomacy alone could achieve in the absence of a shared historical settlement.

Although the Cold War ended in 1991, deeper arguments about power, status, and security continued, with no consensus on what the end of the conflict truly meant. The U.S. view was that the Cold War marked the triumph of liberal democracy and market economics over the Soviet state system. By contrast, the Russians viewed the end of the Cold War as the outcome of mutual compromise and restraint; consequently, Russia expected to join the post-Cold War order as a great power entitled to build its own system of governance, to have a sphere of influence in Ukraine and Belarus, and to occupy a special place in the wider European order, including a

veto over decisions related to Eurasian security.

This ambition was and is incompatible with the notion of sovereignty and integration that has guided Western thinking on European security since the collapse of the Soviet Union, which has been characterized by a long-term effort to integrate and stabilize an undivided Europe and promote a reformed Russia. Few officials were more deeply engaged in this effort than Strobe Talbott, a U.S. Deputy Secretary of State and a central figure in U.S.-Russia diplomacy during the presidency of Bill Clinton. Talbott's approach was rooted not in triumphalism but in integration. His objective was to reduce insecurity on all sides—through arms control, economic engagement, institutional dialogue, and gradual enlargement of the Euro-Atlantic framework. He assumed that stability and inclusion would serve both Western interests and Russia's long-term transformation.

Until the late 1990s, this strategy achieved meaningful successes. Nuclear arsenals were reduced. Channels of communication deepened. President Clinton used personal diplomacy and engagement at the highest levels to bridge conflicting expectations and visions.

Cooperation was real, though uneven. Yet the tensions that have since reemerged suggest that the end of the Cold War did not resolve the underlying question of Europe's security balance. The current confrontation with Russia stems less from errors of the 1990s than from the fact that the Cold War ended without a shared understanding of what replaced it.

The Logic of Integration

After the end of the Cold War, U.S. policymakers had an urgent sense of the dangers of the new era in the post-Soviet space, including nuclear proliferation, economic collapse, ethnic hostilities, and political fragmentation. An isolated and humiliated Russia was not in Western interests. Nor was Russia left to drift amid an

institutional vacuum: the Clinton administration's strategic imperative was to anchor Russia and its newly independent neighbors within a web of cooperative arrangements that would reduce mistrust and align incentives over time.

This approach was based on several interconnected assumptions: first, that institutions matter, and that states embedded in cooperative frameworks have fewer incentives to act disruptively. Second, that transparency improves international security. Regular contact and arms control mechanisms would lower the risk of miscalculation. This was clearly demonstrated in the peaceful end of the Cold War under leaders like Ronald Reagan, George H. W. Bush, and Mikhail Gorbachev. Third, that political and economic reform, however uneven, would gradually align Russia's internal development with the norms of the liberal international system and the broader post-Cold War European order.

U.S. assumptions were grounded in the experience of Western Europe after 1945, where integration and institutions had transformed Europe. The institutions of European integration helped to overcome centuries of Franco-German antagonism. The enlargement of the European Union and NATO was conceived in a similar spirit—as a projection of stability and a consolidation of security in regions that had long suffered from strategic insecurity.

However, Russia was not willing to play by the rules of integration and institutions. Russian policymakers wanted absolute security for Russia at the expense of the security of its neighbors and the rest of Europe. The new Russia was not willing to play by the rules of the West. Russia did not follow the example of Germany and Japan, which were both determined to integrate themselves into the liberal order after World War II. Talbott's colleague James Collins

noted that “the problem was that the Russian side didn't see it that way at all. They didn't see they lost.”

Two Interpretations of the 1990s

Following the collapse of the Soviet Union, the U.S. assumed that time, markets, and institutions would work in favor of the West, gradually converting Russia into a member of the liberal order. This made U.S.-Russia relations manageable. The United States and its allies understood 1989 as the peaceful conclusion of a long confrontation and the start of a new era of partnership and integration.

The general expectation in the West was that Russia's participation in Western-led institutions like NATO, the International Monetary

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Fund, and the World Bank would encourage Russia to behave like a “normal” European state. Instead, Russian policymakers experienced the demise of the Soviet Union as a catastrophic loss of status and

security. Russia's new President, Boris Yeltsin, did not necessarily see these global institutions as neutral or universally beneficial. Even Russia's reformers saw “integration” as potentially subordinating Russian power, rather than enabling cooperation.

Thus, while the West conceived the end of the Cold War as the start of a new partnership with a reformed Russia, policymakers in Moscow sought the restoration of lost status, power, and grandeur. Strobe Talbott witnessed this firsthand. In 1996, for instance, Yeltsin used a personal meeting with Talbott for an hour-long monologue on Russia's efforts to restore its great power status. “I don't like it when the U.S. flaunts its superiority,” Yeltsin said. “Russia's difficulties are only temporary, and not only because we have nuclear weapons, but also

because of our economy, our culture, our spiritual strength – all of that amounts to a legitimate, undeniable basis for equal treatment. Russia will rise again, Russia will rise again.” The Clinton Administration supported Russian democracy in an effort to avoid the empire-seeking aggression while also enlarging NATO to prepare for a potential return of Russian nationalism.

In sum, the West perceived the end of the Cold War as the starting point of a cooperative future, while Russia saw it as a moment of profound loss. This mismatch created the foundation of the current confrontation between Russia and the West. Although the diplomacy of the 1990s created a dense network of agreements among the U.S., Europe, and Russia, it did not produce a shared understanding of what the future of Europe’s security system would ultimately look like. Was it the global spread of the Western integration model and the promotion of democracy? Or was it the revival of great-power politics and a renaissance of geopolitics once Russia had recovered from its post-Cold War weakness? The post-Cold War moment brought an incomplete settlement. From the vantage point of today, the 1990s were not a break from Russian imperialism; they were an incubation period.

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The Incomplete Promise of Globalization

An Interview with
David J. Lynch

Social Perspectives: Let's go back a few decades, to when globalization first started to take off. What were the political undertones shaping the drive towards globalization, and how much were those linked to its basic economic project?

David J. Lynch: We can start at the end of the Cold War. There was a real feeling that democracy and free markets were on the march. From the perspective of U.S. policymakers who were on a bipartisan basis pursuing global economic integration, there was a feeling that it was going to deliver a double win for Americans: there would be widespread shared prosperity at home, and greater economic integration would facilitate a harmonious world environment. Authoritarian countries like Russia and China would open their political systems under the influence of greater trade and join this U.S.-led international order. Now, people look back and say, "What were people thinking? How could they possibly imagine that China was going to liberalize politically?"

That may seem impossible from today's vantage point. But from the perspective of those who had, like me, grown up in the Cold War, where nuclear catastrophe was the central worry—both as a function of the Reagan administration's policies and of Soviet intransigence—such

a change was not so fanciful. To see the Berlin Wall collapse and the Soviet Union itself disappear, on Christmas Day of all things—if you lived through such a sea change, it was not too far-fetched to think that democracy could, even in the wake of Tiananmen Square in 1989, one day come to China. It was a very optimistic time.

SP: At what point did this consensus start to fracture? Was there a primary catalyst?

Lynch: Thinking about China—which for many encapsulated the hopes of a liberal, globalized order—economic reform momentum started to flag soon after the country's entry into the World Trade Organization in 2001. The Chinese had done a lot in the 1990s to overhaul their regulatory and legal structure to make their system compatible with the market-based tenets of the WTO. But by 2003 there was push-back from Chinese state-owned enterprises, elements of the security services, and hardliners through various levels of the Chinese system. This opposition only escalated in the run-up to the 2008 Beijing Olympics. Although many associate China's turn to authoritarianism with Xi Jinping, much of this was already happening under Hu Jintao, his predecessor.

I think the U.S. was slow to recognize the determination of Chinese leadership to preserve both their authoritarian political structure, the Communist Party's monopoly on power, and elements of their non-market economy. The expectation was that China would continue to steadily liberalize, and politically there would be some contest for power. By the late 1990s China were starting to hold elections at the village level on a very limited basis. That's not the same as having a national election, but they were baby steps, and one could imagine a process that would lead to Communist Party-approved candidates that held genuinely differentiated views. But that progress became a dead end.

SP: Was there a point at which the U.S. might still have been able to identify the drawbacks of globalization, and start to adapt before they caused as much chaos as they have?

Lynch: I've tried to resist writing history with perfect hindsight. But I do think it's possible to imagine an alternative course. My criticism is not of globalization itself—as I say in my book, it's produced incredible benefits. Globally, 1.5 billion people were raised out of crushing poverty. Even here in the United States, where trade liberalization has been more controversial, we benefited from the availability of inexpensive Chinese products that helped keep inflation under control. For about 15 years the typical American household saw an increase in purchasing power of \$1,500 a year thanks to low-cost foreign products, and enjoyed a better mix of American jobs. The problem was that while the benefits were spread out, the downsides were concentrated in specific communities, primarily factory-dependent small towns. And the retraining, relocation assistance, income support, and place-based strategies that should have eased this negative impact never emerged at scale.

Another element of this is that global supply chains were optimized for low cost and efficiency above all else; consequently, they became very brittle and didn't perform well during the pandemic. There were previous indications of this brittleness, for example in ripple effects from the Fukushima nuclear disaster in 2011. These were all things that we saw along the way. What I call the "globalization gamble" is that we effectively bet that we could enjoy all the good elements of globalization without worrying too

much about the cost. That ultimately proved to be a bad bet.

SP: Right now, there's a clear move in the U.S. towards a more active state role in the economy, for instance through government stakes in critical tech companies. Is this a fundamental break in how the U.S. approaches trade and innovation?

Lynch: Ronald Reagan must be rolling in his grave to see a Republican president who is criticizing the newly elected Democratic mayor in New York for communist tendencies, all while he has the government take stakes in U.S. Steel, Intel, and MP Materials, and plans to do this with additional companies. It is about as far from Republican orthodox economic think-

“I think we're still casting around for a different approach to trade globalization that gives far greater attention to the resilience of supply chains and national security.”

ing as you can get. It remains to be seen whether this outlasts Trump. If we look at the Biden administration's industrial policy investments and the Trump approach to tariffs and government activism, both

parties appear to be fighting the last battle on manufacturing employment, which has been falling for decades in the United States and other advanced economies, and even in China today. I think those efforts are doomed to be costly failures—especially because about 75% of manufacturing job loss has come from automation.

SP: Speaking of state intervention in the economy, how are the Trump administration's tariffs impacting global supply chains? Are political and diplomatic alliances following?

Lynch: The President came out of the gates firing with both barrels. For six or so months it was non-stop, particularly on the so-called

Liberation Day on April 2, 2025, when he introduced the universal tariff of 10% on nearly all imported goods and the higher “reciprocal tariffs,” although there was really nothing reciprocal about them. That was a complete break with the traditional American approach to global integration that we’d followed for eight decades, and it was far more comprehensive than the protectionism of Trump’s first term. But now, a year out, only about half of the tariffs that he talked about have been imposed. There have been many carveouts and bilateral deals, so it hasn’t been quite as dramatic as expected.

The problem, if you’re a corporate supply chain manager, is that you don’t know where this will end up yet. The President says a lot of things, walks back deals, and contradicts himself. Changing supply chains is not like deciding to go to a different bar tonight. You have to visit a new factory, see their operation, have them do a limited run on the product. You might move a percentage of overall production to them to see how they handle it. The logistics in a particular country are almost certainly not going to match China’s well-developed factory infrastructure. So, a lot of companies are caught not knowing exactly what to do just yet, because they’re not sure when the dust settles what the final tariff structure is going to look like.

SP: Many people are skeptical about the tariffs, but it does seem like there’s a consensus around the need to adopt a different approach to global economics.

Lynch: There are still various camps on this: there were the traditionalists who viewed the first Trump term as an aberration. But Biden ended up continuing much of Trump’s industrial policy, preserving many Trump tariffs and adding some of his own. There is still a cohort of traditionalists who see most things that have been done since 2016 as counterproductive and aberrational. I think we’re still casting around for

a different approach to trade globalization that gives far greater attention to the resilience of supply chains and national security, as opposed to simple cost effectiveness. It remains to be seen whether an alternative approach will garner enough momentum to make it into policy.

David J. Lynch is the Global Economics Correspondent at The Washington Post. He previously worked at the Financial Times, Bloomberg, and USA Today. He is the author of The World’s Worst Bet: How the Globalization Gamble Went Wrong (And What Would Make It Right). He holds an M.A. in International Relations from Yale University and a B.A. in government from Wesleyan University.

Alternate Futures in Afro-Chinese Cooperation

An Interview with
Bulelani Jili

S*ocial Perspectives:* Much of your research focuses on the technological ties between African countries and China. African governments are pursuing Chinese surveillance infrastructure as a technology-based solution to political and structural challenges—does this mean they are choosing a fundamentally different vision of the future than the common Western prescriptions of liberalization, development, and legal reform for addressing these same challenges?

Bulelani Jili: The procurement of Chinese surveillance technologies is conditioned in part by their relative financial accessibility compared to Western alternatives, as well as by the diplomatic and financial architectures that accompany their procurement—for example, pre-negotiated concessionary loans through multilateral platforms like the Forum on China-Africa Cooperation (FOCAC). These systems are acquired under the promise of a technological fix—often cast as a neutral and progressive force—that does not merely address development challenges, but actively sets the terms through which governance, development, and imagined futures are organized around the means—cameras, platforms, analytics—and logics of surveillance. Put simply, their mass adoption channels political

questions through ostensibly apolitical frameworks of optimization and control. Although these surveillance technologies are often framed as strengthening economic development, state capacity, and the rule of law, there is limited empirical evidence to underpin these assertions. In fact, the promise of the technological fix can entrench economic inequalities—both between Beijing and African countries and within African societies themselves—and gradually erode civil liberties.

SP: You describe surveillance technologies as ‘infrastructural nodes in developmental capitalism.’ How do these technologies interact with state power?

Jili: Surveillance technologies are procured across Africa—most notably in Kenya—under the banner of smart cities initiatives, framed as technical solutions to increase security in order to enable economic growth. But these systems are not neutral instruments of development; they reorganize the very terms through which development is governed. Crucially, they become sites in which security, economic planning, and statecraft are made legible and actionable: structural challenges are framed as simple development problems amenable to digital solutions. By extension, these technologies operate as nodes in a developmental capitalism whose center of gravity has shifted from the West toward Beijing and promise to compensate for the skeletal character of the postcolonial African state. They do not address colonial inequalities or bureaucratic weakness directly, but reorganize governance by shifting security, coordination, and managerial authority into technical conundrums and contractual procedures.

SP: How do Chinese firms differ from Western companies in the partnerships that they build with developing countries? How do the political undertones of these relationships differ, and are

they reflective of changing global dynamics?

Jili: What is most important is the collaboration between major Chinese firms like Huawei and the Chinese state to support China's expanding digital footprint in Africa. Pre-negotiated concessional loans, which bind development finance to commercial agreements, allow Chinese firms to take the lead in African infrastructure projects. Beijing's concessional loans to African governments are designed to facilitate the procurement of Chinese technologies. In doing so, Chinese development financing operates politically: it expands Chinese corporate presence, narrows procurement choices by structuring tenders in ways that initially exclude Western firms, undercut Western competitors, and extend the deployment of surveillance tools, and more broadly Chinese tech, in African countries.

This collaboration between Chinese firms and government reflect broader shifts in the global order. Crucially, Chinese companies operate within a model of state-corporate alignment that allows infrastructure, finance, and diplomacy to move together, offering speed and scale that many African governments find attractive—and that Western firms cannot match. At the same time, this public-private entanglement raises questions about transparency, competition, and long-term dependency. The contrast is less about corporate ownership form alone than about how corporate strategies are embedded in changing geopolitical and developmental architectures—signaling a move away from Western-dominated finance and tech toward a more multipolar, but still asymmetrical, global system.

SP: Your research centers state sovereignty rather than democracy or human rights as the key lens for understanding what choices states

make around technology adoption. How do sovereignty and technology interact in the contemporary era?

Jili: In the contemporary era, sovereignty and technology are best understood as mutually constitutive rather than separate artifacts. As scholars such as Hannah Appel, Brian Larkin, and Antina von Schnitzler have shown, technological infrastructure does not simply support state power; it is a primary body through which sovereignty is enacted and made visible in everyday governance. Their work marks a conceptual shift away from viewing sovereignty solely as territorial control or external recognition, toward understanding it as something performed through administrative, technical, and institutional apparatuses.

Thus, we should approach sovereignty not as a fixed legal status or abstract ideal, but as a techno-cultural production, created through the interplay of digital systems, institutional projects, and political imaginaries. Digital infrastructures such

as surveillance systems reorganize how authority is exercised, how populations are rendered legible, and how development and security are imagined as governable problems. In this sense, sovereignty is increasingly produced by technical systems that appear neutral or developmental, even as they redistribute power across states, firms, and infrastructures. As an analytical entry point, sovereignty is a fulcrum that holds together the often-competing concerns of state capacity, technological power, and civil rights.

By extension, sovereign claims are both material and representational: they involve cables, cameras, platforms, and contracts, but also narratives of progress, security, and modernization that legitimate their deployment. Considering

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both dimensions allows us to see that sovereignty is actively assembled within a global order marked by enduring asymmetries of power. What is required, then, are analyses that trace how sovereignty is produced, contested, and put to political work through digital infrastructure in practice—rather than evaluated solely through normative frameworks of democracy or rights.

SP: How do you think Africa’s changing global relationships will shift the role it plays in the international order of the coming decades?

Jili: Amid intensifying U.S.–China competition and the growing global engagement of middle powers such as South Africa, African states are increasingly acting as brokers. By navigating overlapping partnerships, they seek financing, security support, and technology transfer, producing not alignment but “portfolio diplomacy”—diversification without a clean break from existing geopolitical arrangements and diplomatic agreements.

Africa’s geopolitical salience will grow because it is becoming indispensable to the material and digital foundations of global capitalism: critical minerals, energy transitions, logistics corridors, a young labor force, cloud and data-center geographies, and AI supply chains (including labor and data). This will gradually elevate Africa’s importance—but it also raises the risk of a familiar colonial pattern: integration as a supplier of inputs rather than as a site of value creation. In other words, Africa risks remaining a supplier of raw materials for value-added production carried out elsewhere, in the Global North, Asia, and particularly China. Thus, the critical question is whether African states can effectively bargain for refinement processes, participation in setting global standards, and domestic tech capability-building, rather than rents and extraction.

Dr. Bulelani Jili is an Assistant Professor at Georgetown University, where he serves in the African Studies Program and the Science, Technology, and International Affairs (STIA) Program. He holds a Ph.D. from Harvard University, an M.Phil. from the University of Cambridge, and a B.A. (with honors) from Wesleyan University.

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