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The Abandoned Order Learning to Live in a Post-American World

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Five years ago, the Chinese housing market crashed, leaving thousands of apartment buildings unfinished across the country. A generation of Chinese citizens who had bet all their savings on indefinite expansion suddenly found themselves homeless. Over time, however, some intrepid people moved into the ruins of these edifices, setting up tents on the concrete floors, using bed sheets as walls, cooking on makeshift stoves. The Chinese call these abandoned structures *lanwei lou*, a phrase that literally means “rotten-tail buildings,” signifying a project gone awry, a plan in suspension. The inhabitants of rotten-tail buildings repurpose the old and improvise to find a way of surviving an economic storm. The state of the Chinese housing market is a good metaphor for the U.S.-led rules-based international order. After decades of expansion, it, too, is being abandoned. Never fully accepted by [China](#) and Russia and resented by newly assertive middle powers, its main financial backers—the American people—have lost interest in underwriting its further development. And as in the case of China’s failed housing projects, no alternative provider is stepping in to take over.

A rotten-tail world is emerging, one in which states will have to adapt cunningly, improvise new uses for elements of the old order that remain valuable, and adjust swiftly to the dramatic decay of

others. But too many leaders still act as if the old order can somehow be salvaged or even perfected. The UN General Assembly still meets every year, despite being increasingly sidelined from diplomatic efforts. The World Trade Organization carries on adjudicating trade disputes, despite a surge in protectionism. UN climate change conferences convene to chart an increasingly hopeless path to net-zero emissions. International working groups still meet to discuss grand plans for a two-state solution, even as the Middle East burns.

The United States' allies, in particular, simply do not understand yet that Washington has withdrawn its support from the old order and from them. [NATO](#) Secretary-General Mark Rutte has mocked those Europeans who suggest learning to defend themselves without U.S. help, telling them to “keep on dreaming.” NATO’s July 2026 summit offered one of the most surreal examples of cognitive dissonance: European leaders frenetically pledged tributes to U.S. President Donald Trump in the form of arbitrary defense spending increases—unrelated to their own defense analysts’ assessments—in the hope that he would not withdraw from the alliance. The United Kingdom continues to entrench its security dependence on the United States by buying U.S. fighter jets, and Denmark is approving major arms purchases from Washington even as Trump threatens to forcibly annex its constituent territory, Greenland. Australia is plowing ahead with investments in AUKUS, its trilateral security partnership with the United Kingdom and the United States, subsidizing the U.S. industrial base even as American commitments falter. Leaders who fail to confront their new reality are failing their countries. It is time to acknowledge that the old order really has

disappeared—and to plot a new approach to geopolitics. This moment does not constitute a short interregnum between a U.S.-led order and a Chinese-led one. For some time, the world will be without any order at all—swept by fragmentation, contagion, and strangulation or the temptation to weaponize a wide variety of geographic, economic, and technological chokepoints. Rather than constructing a grand strategy, states will need to develop far more flexible and artisanal responses.

REALITY CHECK

U.S. Secretary of State Henry Kissinger once asserted that world order rests on two pillars: a reasonably stable balance of power and a set of commonly agreed-on rules about what states may or may not do. Today, both pillars are crumbling, and it is unlikely that they can be fortified or rebuilt any time soon. The United States remains the world's preeminent military, economic, and technological power. But it is increasingly clear that Washington no longer has the ability to prevent conflicts or ensure the free flow of commerce worldwide; it could not even open the [Strait of Hormuz](#) after a militarily hobbled Iran shuttered the waterway. Even at the height of U.S. power, adversaries in Afghanistan and Iraq were able to exploit asymmetric advantages to challenge it. But swift technological change, especially the proliferation of cheap missiles and drones, is rapidly undermining the U.S. military's command of the seas and skies and the relative peace that went with it. Even before Trump, the alliance system that helped the United States enforce the rules was weakening; China, Russia, and rising powers that didn't make the rules were pushing against them.

Then, [Trump](#) launched a rebellion from within against the U.S.-led order, bullying American allies, ditching the World Health Organization, scrapping the U.S. Agency for International Development, and imposing widespread punitive tariffs. His will to dismantle the order the United States built has been extraordinary. But even after his presidency ends, in 2029, it is highly unlikely that the United States will resume its old role. Americans had already lost interest in being the world's primary provider of public goods, its police officer, and its free-trade champion. And no other power has the ambition to take up the mantle.

In dozens of private conversations I have had over the past year with leaders worldwide, the only thing they agree on is that they do not know what will come next. They are struggling to use history or theory to find their bearings. The briefings they get from their intelligence agencies and diplomatic services no longer give them any certainty. Ahead of every NATO summit, I receive text messages from European leaders asking me what I think might happen. One Gulf leader recently admitted to me that he simply had no idea what arrangement would settle the dispute over the Strait of Hormuz. The national security adviser of a U.S. ally in the Indo-Pacific said his government no longer knew whether the United States would defend his country in a crisis.

The central feature of these conversations is uncertainty, a sense that the world defies conventions and understanding. Episodes of rule breaking always characterized the rules-based order, but they took place within an overall framework that still held. This is the distinction: in a disordered world, actors violate rules they still

recognize. In a world defined by what might be called “un-order,” they act without reference to any common framework at all.

A WORLD IN PIECES

The uncertainty that pervades this orderless age is driven by three forces upending the international system: fragmentation, contagion, and strangulation. Trump’s predatory approach to partners is fragmenting the West as a political community. Alliances are splintering, and not just Western ones; consider the disarray in the Gulf Cooperation Council. Trade restrictions are breaking up world markets, but not into tidy blocs. Global problems no longer attract global solutions but rather a patchwork of short-term fixes.

The deepest fragmentation is epistemic. A digitally connected world is not simply dividing over interpretations; its inhabitants no longer agree on facts, erasing the sense of shared reality that underpins diplomacy itself. Consider the war that the United States and Israel launched against Iran in February. The parties to the conflict have been unable even to agree on whether a cease-fire exists, what leverage they have, or who won or lost.

The aspiration to establish a single global order is giving way to a reality in which many organizing systems coexist and compete. Some frameworks are organized around regions. Others, including the Pax Silica (a new initiative to secure tech supply chains), the Comprehensive and Progressive Agreement for Trans-Pacific Partnership, and AUKUS, seek to govern arenas such as technology, trade, and security. Gone is the idea that the United Nations or even the United States could oversee comprehensive peace deals that successfully address territorial claims, postwar

justice, and reconstruction. Instead of such deals, limited cease-fires and truces—negotiated not by diplomats but by a motley crew of intermediaries such as the American real estate mogul Steve Witkoff, the Russian banker Kirill Dmitriev, and Asim Munir, Pakistan’s top general—aim to freeze conflicts rather than resolve them. In a world of unreliable allies, countries will hedge. The Nuclear Nonproliferation Treaty could cease to function as a meaningful constraint, and Germany, Iran, Poland, Saudi Arabia, and South Korea could move to acquire nuclear weapons within two decades.

Also gone is the notion that consistent rules ought to govern the global economy. Economic nationalism and protectionism are on the rise; the EU’s introduction of the Carbon Border Adjustment Mechanism, Trump’s tariffs, and China’s export controls are all accelerating the breakup of the global economy. Identical barrels of oil now trade at vastly different prices depending on where they are sold, through which payment system, to which buyer, and under which sanctions regime. In early April, for instance, Brent futures traded at around \$113 per barrel while physical cargoes of the stuff sold for as much as \$144. Oil futures and spot prices usually diverge, but only by a few dollars; such a spread is extremely unusual. The London and New York gold markets are also experiencing bouts of sharp price divergence. This kind of fragmentation will only become more pervasive. The dollar’s dominance will erode more rapidly, with its share of global foreign exchange reserves perhaps falling below 50 percent as bilateral currency arrangements proliferate and the pricing of commodities diversifies. U.S. borrowing costs will rise, and global transaction costs will balloon as incompatible systems multiply.

OUT OF CONTROL

Another big challenge is contagion. International law and norms formerly put limits on states' actions. Great powers might not always have adhered to the rules, but they were imposed on smaller powers and set expectations for how business would be conducted. But in this era of disinhibition, crises no longer stay in their original domain, and actors no longer feel constrained by norms governing proper conduct—indeed, many of the world's most powerful actors no longer even seem aware that they are breaking rules.

In this environment, disputes are also less likely to remain compartmentalized. France and Germany strongly opposed the war the United States launched against the Iraqi dictator Saddam Hussein in 2003, but that did not prevent them from continuing to share intelligence with and trade with the United States, nor did it stop them from cooperating with Washington on other NATO matters. When Trump threatened tariffs against European allies who opposed his claim to Greenland, by contrast, he demonstrated that even among allies, economic and security relations are no longer separate. During the recent Iran war, when several European countries expressed reservations about the conflict, Trump threatened to halt trade with them and withdraw troops stationed in their countries.

Too many leaders still act as if the old order can somehow be salvaged.

And after Israel and the United States attacked [Iran](#), the Islamic Republic and its proxies launched strikes on U.S. partners Bahrain, Oman, Jordan, Kuwait, Qatar, Saudi Arabia, Turkey, the United

Arab Emirates, and even Europe, by assaulting Cyprus. Rather than seeking to hinder the U.S. war effort directly, Iran seemed intent on disrupting global markets as much as possible. Frustrated by Pakistan's closeness to Iran, the United Arab Emirates, for its part, also retaliated across domains by forcing an early repayment of a \$3.5 billion debt and deporting thousands of Pakistani workers.

This same disinhibition increasingly governs how war itself is waged. The taboos against assassination, targeting civilians, and embarking on wars of territorial conquest are vanishing. According to reporting in *The New York Times*, Israel planned to assassinate the Iranian foreign minister and speaker of parliament while the two were conducting negotiations with the United States.

Throughout its war in Gaza, Israel attacked people and facilities that were previously not considered legitimate targets: journalists, hospitals, cultural sites, religious institutions, and civilian infrastructure; Israel claimed that Hamas used such targets as covers. Russia regularly targets civilian infrastructure in its war in Ukraine, and both countries are killing each other's citizens in third countries in targeted assassinations.

This kind of uncontrolled escalation will almost certainly lead to more wars. Countries beyond the United States may be tempted to blackmail their allies, and the threat of nuclear attacks could become normalized. Most worrying is the prospect of a proliferation of small wars for territory. There is no shortage of possible catalysts. China could target Taiwan outright; Venezuela could decide to use force in pursuit of its claim on Essequibo, the resource-rich western half of neighboring Guyana; Ethiopia might

try to wrest access to Eritrea's Red Sea ports; and Russia might decide to seize the Estonian border town of Narva.

THE BIG SQUEEZE

In a marriage that has gone wrong, the ties that bound a couple together in good times—the house, the children, the dog—become the weapons they use to hurt each other in bad times. Likewise, in today's geopolitics, states are increasingly turning the systems that once connected them—energy routes, semiconductor supply chains, financial infrastructure, shipping lanes—into weapons. A country's control over chokepoints is becoming a key marker of its power, just like its GDP and the size of its military.

Western countries have been particularly active in identifying and weaponizing chokepoints, above all through their control of the global financial system and essential technologies. The first Trump administration restricted Chinese companies' access to high-level microchips. The Biden administration stepped up this technological throttling by imposing wider export controls, taking advantage of the fact that U.S. and allied firms dominate the production of chip manufacturing equipment and the software required to make advanced chips. In 2022, after Russia's full-scale invasion of Ukraine, a coalition of European and North American countries took the remarkable step of weaponizing the dollar to punish a G-20 country when they cut Russian banks out of the SWIFT payments system and froze \$300 billion of Russian central bank reserves.

China, learning from this, is rapidly expanding its own authority over chokepoints. In 2010, Beijing briefly experimented with cutting off rare-earth exports to Japan amid a territorial dispute, but it had not yet established the bureaucracy to target such

controls precisely. Since then, it has built its own export control system explicitly modeled on Washington's and extended the resource chokepoints it commands from raw materials to processing. In late 2025, China adopted its own version of the U.S. foreign direct product rule, asserting a right to decide whether companies can access magnets anywhere in the world if they contain even trace amounts of Chinese materials or were made using Chinese technology. In effect, Beijing turned against Washington the same extraterritorial tactic Washington had invented to control chips. Smaller countries and nonstate actors are increasingly exploiting chokepoints, as well. According to German prosecutors, a Ukrainian team destroyed the Nord Stream pipelines to break Europe's dependence on Russian gas. Even before Iran shuttered the Strait of Hormuz, bringing 20 percent of global oil and liquefied natural gas shipping to a near halt, the Houthi militia in Yemen was using cheap drones and missiles to block transit through the Red Sea.

Such exploitation of chokepoints will soon be universalized. The consequences could be extraordinary, because the potential bottlenecks are innumerable: they exist not only in physical waterways but also in the supply chains for weapons as well as food, health care, and basic technology—all the essentials people need for everyday life. The United States might prevent Europeans from using its AI models or even block their access to Microsoft's products. China could further restrict the rare earths used in U.S. and European weapons systems and high-end technologies or leverage its control over the global electric vehicle, solar, and wind industries. And because it makes the vast majority of active pharmaceutical ingredients, Beijing could even constrain the

production of vital medicines. The food supply would be particularly easy to throttle: over 55 percent of globally traded maize, wheat, rice, and soybeans pass through at least one maritime chokepoint, and energy disruptions can become food-price crises within weeks.

Blocking one chokepoint diverts traffic to others, congesting alternatives. The Hormuz closure forced oil shipments around the Cape of Good Hope. A simultaneous closure of the Suez Canal and the Strait of Malacca would have no viable solution. Both Iran and the United States have suggested they intend to extract tolls from ships transiting the Strait of Hormuz, and other states might be tempted to start charging for access to international waterways. The closure of any single chokepoint might be manageable. But numerous lockdowns would not be.

GET REAL

Two broad ways of dealing with this new world are emerging: the method of the architect and the approach of the artisan. Architects develop blueprints for order and try to mold the world to their designs, developing universal norms and anchoring security in multilateral institutions. Artisans, on the other hand, don't assume they have the power or resources to build grand structures from scratch. Instead, they use improvisation and flexibility to cope with a world that doesn't lend itself to sweeping plans. In many ways, China already behaves like an artisan state. It advances its interests by repurposing existing institutions, such as when it used the International Telecommunication Union to build surveillance-friendly controls into global Internet standards, and by creating new institutions, such as the Shanghai Cooperation Organization and BRICS+, the geopolitical bloc that marshals Brazil, Russia,

India, China, South Africa, and four other new members. These institutions are flexible in their membership and purpose and not intended to set global rules. Other middle powers such as Brazil, India, Iran, and Turkey are creating and joining a plethora of similar groupings, balancing and hedging between the great powers.

In many other middle powers in Europe, the Indo-Pacific, and North America, by contrast, grief over the rules-based order is bringing out an architectural instinct. Although they admit uncertainty, leaders in those places fail to grasp the changes they are facing, and their strategies too often propose maintaining the form of the old order without its substance—the legitimacy and enforcement capacity conferred on it by the United States. They are still scrambling to shore up the rules-based global trading system by attempting to build a carbon copy of the World Trade Organization’s deadlocked appeals mechanism and continuing to lodge complaints against U.S. tariffs at the WTO, the equivalent of shouting into the void.

Too many governments are still trying to curb conflicts using the UN or international courts. Ireland, for example, joined Spain in backing South Africa’s genocide claim against Israel at the International Court of Justice, a much-ballyhooed effort that has had virtually no effect on Israeli policy. Australia’s foreign minister has spoken of a “new era of amplified middle power diplomacy” that would seek to shore up formal multilateral commitments and enforce international law. The key difference between these projects and the more artisanal ones being embraced by China and others is that their purpose remains primarily

legalistic, focused on achieving change by adhering to increasingly obsolete frameworks.

The old rules-based order was never, in fact, just about rules. It proffered rules backed by a specific power willing to bear disproportionate costs to maintain them. The United States and its European allies were the architects of the postwar and post–Cold War orders, but they no longer have the resources to maintain them. And middle powers cannot simply pool their resources and replicate the past. No coalition can keep the WTO relevant, ensure the dollar’s dominance, or open the Strait of Hormuz. Politicians talk like architects because they believe it inspires confidence. In reality, such talk undermines confidence.

The United States’ former allies must instead think and act like artisans. Many of these countries are better equipped for this strategy shift than they realize. Their histories are peppered with examples of innovation and flexibility.

Whereas architects seek stability, artisans prepare for chaos and change. Architects might try to reform the UN Security Council or restore the WTO’s appellate body. They would be wasting their time. Artisans follow the course diplomacy is already taking. China is an observer on the Arctic Council. The EU should likewise apply to join BRICS+, the Shanghai Cooperation Organization, or the Association of Southeast Asian Nations as an observer. On trade, an artisanal approach would mean investing in new infrastructure nodes built around corridors and ports, such as the Lobito Corridor, a logistics route connecting mineral-rich central Africa to the Atlantic. These promise greater rewards than

sweeping trade deals such as those the EU has sought with India or the South American economic bloc Mercosur, which can take decades to negotiate. And instead of competing to nominate their diplomats as UN special envoys, Australia, Norway, Spain, Sweden, the United Kingdom, and similar states should seek to contribute to the more unconventional conflict mediation efforts now being spearheaded by countries such as Pakistan and Qatar. Whereas architects believe there can be a single rule book for everyone, artisans accept that multiple sets of guidelines will coexist. Groupings such as the EU should increasingly turn their efforts toward creating rules-based orders in their own neighborhoods rather than striving for an unattainable global order.

Sweeping multilateral regulatory approaches, such as the EU's General Data Protection Regulation, are losing their efficacy as other major markets, including China, cease copying the EU playbook. So are global frameworks to solve problems such as climate change. The competition to dominate renewable technologies has probably done more to combat rising emissions than all the Conference of the Parties meetings combined. Europeans and members of the G-6+ should make every effort to understand how Brazilians, Indians, Indonesians, Russians, and South Africans are viewing this moment. If they want to hedge more efficiently, they must better understand their fellow hedgers. Whereas architects see globalization as a means to transform others, artisans worry about the vulnerabilities that interconnectedness creates. Europe and its allies have more means to develop self-reliance and work out arrangements with other powers than they give themselves credit for. To protect itself from Chinese blackmail, Europe could leverage its Airbus sales by

withholding software updates for China's Airbus fleet, which would ground more than half the country's commercial planes. To retaliate against U.S. tariffs, it could cut off market access for American social media companies. To deter China from threatening its sovereignty, Taiwan could restrict its critical semiconductor industry.

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Such strategies may be more defensive in focus, but if countries want to thrive, they need to boost their security, industrial competitiveness, clean energy leadership, and global influence. A core part of doing so is pursuing technological sovereignty. Instead of accepting dependence on American technology or betting the bank on building autonomous tech stacks, they need to use the leverage they already have to minimize the risk of aggressive actions against them and expand their natural advantages. In 2023, the United Kingdom's National Health Service awarded the U.S. technology company Palantir a major contract to provide its new data platform; this year, a new British police AI program expressed interest in working with the firm. Instead, it should use the power of its purse to incentivize domestic providers, using open-source tech, to develop specialized tools and mandate open standards and portable data formats as a condition of public contracts, so no single vendor's platform becomes a permanent chokepoint.

Perhaps most important, while architects think about security from the outside in, artisans realize a country must be defended from the inside out. European and Indo-Pacific states must salvage what they can from the old security architecture—by, for instance, drawing on NATO's command structures for military operations—

and become far less reliant on the United States as an eternal security provider for their regions.

And they must not simply try to replicate the United States' capital-intensive military methods. They must develop more frugal ways of war that are relevant to their individual situations.

[Ukraine](#) and Iran have both demonstrated how to adapt cheaper technologies for both offensive and defensive purposes, neutralizing their opponents' advantage in vastly more expensive high-tech systems. Many countries will benefit from similar hedgehog strategies that draw on the technological revolution favoring defense, insulating their territories against contagion. For European countries, this means building military capacity, fighting tooth and nail to prevent Russia and the United States from making deals over their heads, and taking a more detached approach to conflicts in more distant parts of the world. Japan and South Korea must similarly invest in self-defense and work to stop China and the United States from cutting them out of choices that shape their future. Even if the United States is no longer willing to police the world, it has its own important role to play in these efforts, encouraging partners to adapt rather than vassalizing them—even if that means fewer orders for U.S. defense firms.

Well before Trump's second term, changes in the global power structure had hollowed out the old order. And the forces of disruption are likely to accelerate. The next decades will be defined by explosive changes and waves of crises, not a reversion to the old order or the creation of a new one. Like the resourceful denizens of China's rotten-tail buildings, the most successful

leaders will be the ones who take their fate into their own hands instead of waiting for a new set of rules to rescue them.

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