

# Listening Beyond the Echo Chamber

## Emerging Middle Powers Report 2024



# Same world, different priorities?

Flashlight on our expert survey on attitudes to foreign policy in Brazil, Germany, India and South Africa.

**73%** of Indian respondents view China's global influence negatively.

With **38%** climate and the environment are the most frequently mentioned foreign policy challenge for Brazilian respondents.

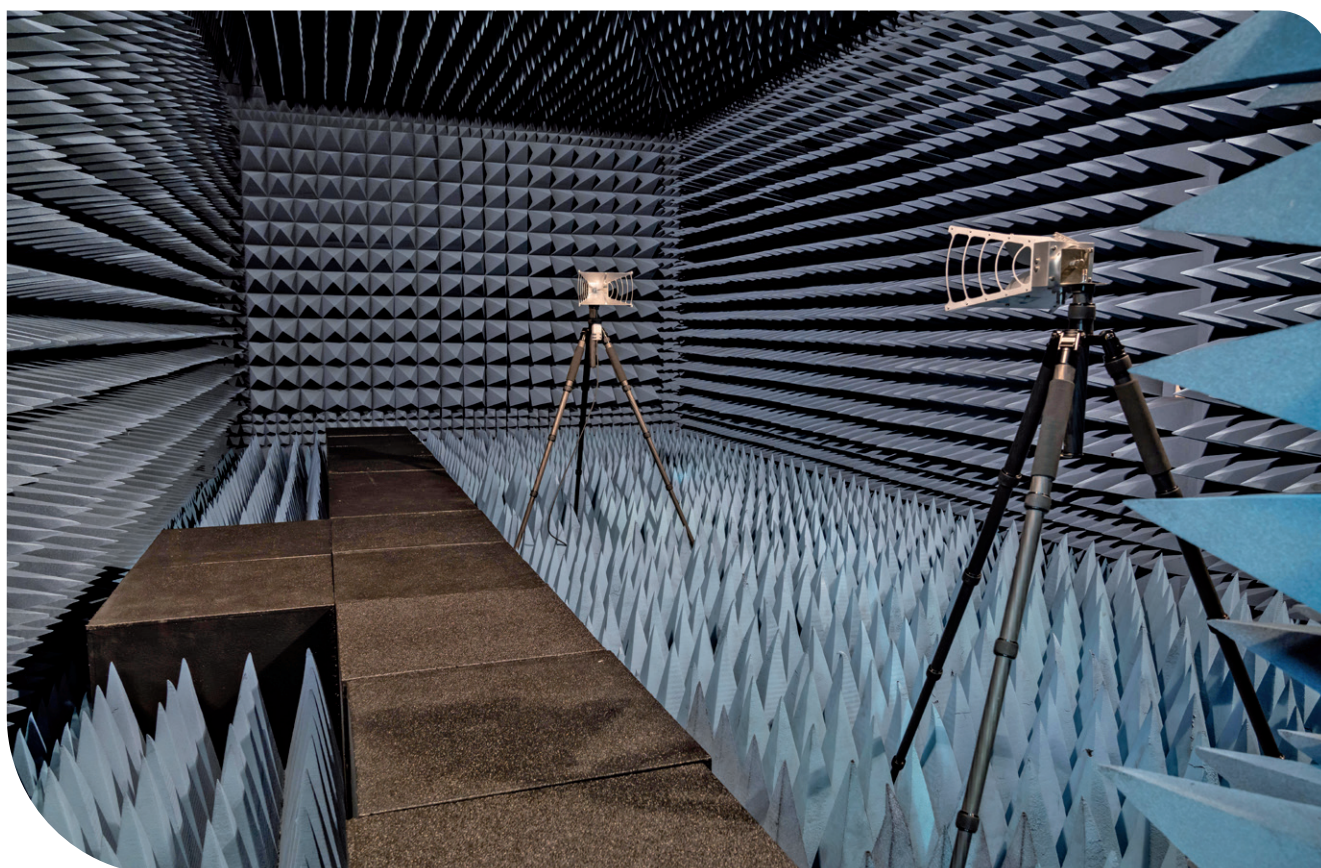
In South Africa, **62%** of respondents are in favour of BRICS expansion.

**91%** of respondents from all IBSA countries want more seats in the United Nations Security Council.

With **40%** most respondents from IBSA countries see power in the world divided between the United States and China.

# Listening Beyond the Echo Chamber

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# Executive Summary

A survey of nearly 1,000 experts from three emerging middle powers (India, Brazil and South Africa) as well as from Germany shows that, despite differences among the four countries, there is a common basis for more meaningful engagement and joint approaches for international reform.

**IBSA and Germany United:** respondents in India, Brazil and South Africa (IBSA) identify a different foreign policy challenge as most important for each country – climate change for Brazil, relations with China for India, the war in Ukraine and the Middle East for South Africa – as well as international trade for all three. These are global concerns and respondents in Germany share them.

Another basis for meaningful engagement is that respondents in all four countries have high hopes for the G20. This is notable because it is an informal body with a diverse membership but no budget or permanent bureaucracy. The IBSA respondents also show considerable interest in reforming the United Nations Security Council (UNSC) through expansion. While Germany also wants to reform it, German respondents are just as inclined to see it replaced instead.

**IBSA and Germany Divided:** respondents in Germany mention the wars in Ukraine and the Middle East as well as strained relations with China as the most pressing foreign policy challenges for their country, but they do not rank international trade high. They want to support Ukraine, stand firmly on the side of the United States, perceive the dominance of the US-dollar in international trade and finance as favourable and are critical of BRICS+ as a forum for economic and political cooperation as well as of its expansion.

These aspects divide them from the IBSA respondents, who perceive international trade as a foreign policy challenge, prefer to mediate between Russia and Ukraine instead of supporting either, view the dollar's dominance unfavourably and are optimistic about BRICS+. But even in IBSA, some are critical of the group's expansion to include the likes of Iran.

**Dilemmas for Germany and the West:** some of these divides place Germany and the West in a difficult position. They have made efforts to persuade emerging middle powers to take a clearer stance against Russia and support sanctions against it. The survey shows that majorities in IBSA prefer

their country to mediate. The understanding of when the time is right for this differs between the West and IBSA.

While the survey indicates that IBSA does not want to operate on the logic of formal alliances, Germany rejects the idea of a pick-and-choose approach in foreign policy.

**Beacons of Hope:** despite frustration with the most inequitable international institutions, such as the UNSC or the International Monetary Fund, emerging middle powers are not in a doomsday mood when it comes to multilateralism, international cooperation and global governance.

## **Recommendations for Germany and the West:**

Germany and the West must listen beyond their echo chambers, accept different views, respect the agency of emerging middle powers rather than seeing them as pawns in the game of great powers, and ensure equal partnership in a restructured rules-based international order. If Germany truly wants to treat them as 'powers of global consequence', as the head of policy planning in the Federal Foreign Office says in his article, it must support emerging middle powers in taking their seat at the new global high table. At the same time, Germany and the West could respond positively to their interest in acting as mediators between Russia and Ukraine when the time is right, given their experience in this in their own regions.

Instead of seeing them as battlegrounds for geopolitical rivalries, Germany and the West must reform and align their approach with the aspirations of emerging middle powers for rapid economic and sustainable progress. Not forcing them to choose sides is part of this. China enables emerging middle powers to balance their relationship with the United States, and its cooperation with many of them explains why its influence is viewed positively in Brazil and South Africa.

Even if forming alliances is out of reach, the survey highlights niches for multilateral cooperation. The implementation of the 2030 Agenda with a shared commitment to technology transfer, intellectual property right waivers and global public investment with equitable contributions, benefits and governance mechanisms is an opportunity to strengthen multilateral institutions and bridge the gaps between the West and emerging middle powers. ↩

# How to Engage With Emerging Middle Powers

## Ten Policy Recommendations for Germany and the West

### 1. Initiate a listening exercise based on country-specific challenges.

The respondents from the three emerging middle powers surveyed identify a foreign policy challenge that each prioritizes more than the other two. For Brazil it is climate change, for India it is relations with China and for South Africa it is balancing between major powers but also the wars in Ukraine and the Middle East. International trade – free-trade agreements in particular – is also among the most important challenges for all three. These issues are a good starting point for the West to engage in a conversation as an active listener, whether at the G20 or by regularly inviting these emerging middle powers to G7 meetings.

### 2. Approach each emerging middle power based on the results of this listening exercise.

Respondents in Germany too say that climate change, relations with China and the wars in Ukraine and the Middle East are priorities. This should facilitate combined efforts with India, Brazil and South Africa (IBSA). Cooperation should be based on the outcome of the listening exercise, not on what Germany or other Western powers think might be attractive nor on what is exclusively in their interest. The latter includes aid that privileges donor-country firms or that does not take local context and development priorities into account. One example is Western countries investing in places like India and Africa through ‘hot money’ (foreign direct investment in stock markets) or conditional aid, rather than focusing on infrastructure and institution building, as China does in Africa and Asia. The European Union’s precautionary principle-based approach to regulation, which is seen in IBSA as sceptical of growth and innovation, needs to be reformed

and synchronized with the aspirations of emerging economies for their rapid and sustainable economic progress. More technology transfers, fewer restrictions regarding intellectual property rights and reciprocal market access would level the field.

### 3. Offer trial subscriptions instead of full club memberships for cooperation.

The three emerging middle powers surveyed have strong traditions of non-alignment, multi-alignment or neutrality, and they do not operate according to the logic of alliances. For example, respondents from Brazil and South Africa say their country prefers to remain neutral in the Chinese-US rivalry, which correlates with China’s rising economic importance to both countries. Offering them cooperation opportunities that are focused and do not tie them in long-term alliances would be more in line with their foreign policy traditions. Not putting them in a position where they have to choose sides on a plethora of issues would also demonstrate that the West respects their agency and understands that relations with them need to move beyond the historical centre-periphery logic.

### 4. Emulate the ability of emerging middle powers to cooperate despite divergence.

IBSA respondents view the expansion of the BRICS positively for their country and support a further round. The addition of four more members in 2023 shows not only these emerging middle powers’ discontent with established institutions but also that they are comfortable in groupings whose members have differences or even deep rivalries. In a world full of global challenges, Germany and the West must develop this ability for cooperation across divides.

## 5. Leverage the West's remaining positive reputation.

IBSA respondents have a more positive view of their country's relationship with Germany than German respondents have of theirs. They also rate the EU as a relevant institution ahead of regional groupings such as the African Union, ASEAN or MERCOSUR, or of the G7. Germany and the West should leverage these views now to build robust intellectual and institutional links with these emerging middle powers beyond government-to-government relations, especially in the private sector and civil society.

## 6. Use the interest and experience of emerging middle powers in mediation.

Regarding the war in Ukraine, IBSA respondents – particularly in Brazil – prefer their country to mediate rather than support Russia or Ukraine. Germany and the West should not just accept disagreement over this as being a normal part of their relationship; they should also tap the experience these countries have built through conflict-mediation in their respective region when the time is right. South Africa and six other African countries launched the African Peace Mission to mediate between Russia and Ukraine, for instance. Even if this did not succeed, it highlighted the willingness of non-Western countries to address the issue.

## 7. Engage more for international reforms.

German respondents are much less enthusiastic than IBSA ones about various reform measures concerning the UN Security Council, the International Monetary Fund or debt restructuring. Meanwhile a majority of IBSA respondents says Germany taking the lead in reforming multilateral institutions would improve its relations with their country. Rethinking the idea of an Alliance for Multilateralism, of which Germany was a co-founder, to accommodate perspectives from emerging middle powers could be a first step in this direction. Support for and active engagement with multilateral initiatives based on the global agenda proposed by, among others, the Vulnerable 20 Group of Finance Ministers on digital public infrastructure; climate adaptation, loss, and damage; and hunger would also be an important step to strengthen multilateralism and build a truly global agenda.

## 8. Partner with emerging middle powers to revitalize the United Nations.

Few IBSA and German respondents see the United Nations as the best institution to deal with rising global challenges, and a large majority says that maintaining the status quo in the UN Security Council is not viable. There is widespread IBSA support for the latter's expansion. While there is also support in Germany for expanding the Security Council, a significant proportion of respondents favours replacing it. The use of smaller institutions originally with narrower, specific purposes, such as BRICS+ and NATO, to address global challenges has been to compensate for the limitations of the UN system. Germany and the West should work with emerging middle powers to strengthen the UN General Assembly to avoid more such fragmenting of efforts. The noted convergence of views on the UN provides a solid basis for reform efforts to reverse this trend.

## 9. Level the playing field.

By enabling technology transfer, supporting open research and development and global public investment to implement the 2030 Agenda, Germany can significantly improve its relations with emerging middle powers, as the survey responses show. This is necessary as the emergence of China has diversified their partnership options. Germany and the West would also benefit from these measures that would enable these countries that are in a constant problem-solving mode to share their ideas and smart solutions; for example, on global health, digital transformation or climate change.

## 10. Be careful in using military assistance to make friends.

Despite the global arms build-up and its *Zeitenwende*, Germany should not see including military assistance in its cooperation repertoire as a panacea for building better relations with emerging middle powers. A significant share of German respondents say that it is, but this opinion is generally not shared by their IBSA counterparts. In its process of redefining its self-perception as a civilian power, and for strengthening ties with emerging middle powers, Germany should instead focus on trade concessions or easing development aid conditionality, which are seen as more desirable by IBSA respondents. ↗

# Editorial

With widely differing reactions around the world to major crises sparked by NATO's Afghanistan withdrawal, the war in Ukraine, and the terrorist attacks by Hamas on Israel and Israel's retaliation, the West is becoming more aware that it – in many ways – lives in an echo chamber that needs to become permeable to the diverging views of its partners in Africa, Asia and Latin America.

Emerging middle powers – countries characterized by substantial regional influence and growing confidence and assertiveness – have been articulating their interests and stressing their concerns on the global stage for decades. But it is only with the international crises of more recent times that the West has come to notice their wide divergence from itself. This chasm exists partly due to the West's failure to transform its outdated geopolitical and post-colonial perceptions. It must be bridged if the two sides are to find common solutions to the economic, environmental, technological and security problems they both face. The key question is how.

**‘The West needs to accept differing views, including on how to react to the wars in Ukraine and the Middle East.’**

For the West, this requires going back to basics. First, by actively listening to non-Western partners to understand their challenges and interests. Second, by accepting their differing views, including on how to react to the wars in Ukraine and the Middle East. Third, by showing respect for the agency of emerging middle powers instead of seeing them only as pawns in the game of great powers. Fourth, by ensuring equal partnership in a fair rule-making process with consultation and consistent implementation of a renewed rules-

based international order, even when not advantageous to the West.

The first Emerging Middle Powers Survey polled nearly 1,000 politicians, diplomats, journalists, researchers and private-sector representatives from India, Brazil and South Africa (IBSA) as well as from Germany. The three IBSA countries are not only key emerging middle powers. If the West is interested in a truly equitable international reform, their self-image, their non-aligned or multi-aligned foreign policy approach, and their knowledge of how to make the West accountable to its own rules make them ideal first points of contact and negotiating partners for engaging more meaningfully with the non-Western world. The survey results thus provide useful guidance for Germany and the West in the pursuit of the four principles listed above.

**‘In South Africa, the most frequently cited issue is maintaining an autonomous foreign policy between different major powers.’**

Understanding the challenges of the West's partners must begin with an examination of their specific concerns. Brazilian respondents most often cite climate change and the environment as the most challenging foreign policy issue for their country. Indian respondents see China, which their country has a ‘hot’ border with, as the biggest challenge. In South Africa, the most frequently cited issue is maintaining an autonomous foreign policy between the demands and pressures of different major powers, followed by the wars in Ukraine and the Middle East.

This examination is essential for formulating offers to these countries that are not based exclusively on Western interests – whether on issues where concerns are shared by both sides, as in the



case with climate change, China and the two wars, or on issues of concern across IBSA but less so in the West, like international trade. This should be a priority in Germany and the West if they want to join forces with these emerging middle powers.

**‘The unanimous call from IBSA to reform the United Nations Security Council stresses the importance of their agency.’**

Accepting differing views is the most difficult challenge for the West, especially when it comes to the war in Ukraine.<sup>1</sup> IBSA respondents favour mediation over supporting one side, with Brazilians having the strongest preference for this. If the priority is to advance a solution-oriented international agenda, the West must take disagreement as something that is part of every friendship. If it is to overcome its colonial legacy, it must accept that emerging middle powers not only have differing views and interests but also tend to not align firmly with any one camp.

Showing respect for others’ agency means taking non-Western ordering principles and rules seriously. Respondents from all four countries identify the G20 as the best-equipped grouping to deal with global challenges in the next ten years. It is also a platform where emerging middle powers can influence global policy-making. The unanimous call from IBSA to reform the most unequal institutions, such as the United Nations Security Council or the International Monetary Fund, and their emphasis on transforming the rules that perpetuate inequalities, also stress the importance of their agency. The survey shows that for them, technology transfer and global public investment to implement the 2030 Agenda not only address global challenges, but also level the playing field.

This requires an institutional architecture that can accommodate different positions regardless of power asymmetries. That is why the fourth principle matters. The emerging middle powers need an institution reflecting the principles of universality and equity for a fair rule-making and consistent implementation of a rules-based international order. Although the G20 has become an important arena, it cannot replace the United Nations. And yet an average of only 17 per cent of respondents from all four countries consider the UN effective in tackling global challenges. While the path to reforming the Security Council is difficult, alternatives such as upgrading the General Assembly could strengthen the UN as a multilateral rule-making and -implementing institution.

**‘Taking their ideas seriously would show that the West is ready to include them as equals at the new global high table.’**

Emerging middle powers like IBSA are in constant problem-solving mode, and many of their smart solutions can be relevant elsewhere, including in the West. Taking their ideas seriously would show that the West is ready to include them as equals at the new global high table. Ultimately, this shift in thinking will transform the Western echo chamber into a symphony of voices. ↗

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**Partners of the KEMP Initiative: Carlos Frederico Coelho & Paulo Esteves, BRICS Policy Center; Julia Ganter, Körber-Stiftung; Steven Gruzd, SAIIA, Manjeet Kripalani, Gateway House India**

<sup>1</sup> The survey was developed prior to the Hamas attack on 7 October 2023 and therefore does not include a question specifically addressing it or its repercussions.

# Still not Weatherproof

Threatened by China, India is relying on the United States and France instead of Germany. Must this remain so?

The emergence of India, Brazil and South Africa as powers on the world stage has implications for the older middle powers in Europe, including Germany. The findings of the Emerging Middle Powers Report 2024 provide crucial insights for German policy-makers in this regard.

For 49 per cent of respondents in India, China is the most significant foreign policy concern. This is a view not shared in Germany (27 per cent), Brazil (6 per cent) and South Africa (2 per cent). The main reason is India's decades-long border dispute with China, which was exacerbated by the Chinese violation of the border in 2020, resulting in strained relations.

**‘The Belt and Road Initiative is considered a threat to India’s sovereignty and territorial integrity.’**

Indian respondents also worry about China's growing influence in South Asia, including through the Belt and Road Initiative, which is considered a threat to India's sovereignty and territorial integrity. The mistrust of China extends to the Shanghai-based BRICS Bank, seen as the least useful financial institution for Indian interests. This perception also explains India's preference for the G20 over the BRICS, where Chinese influence is on the rise.

The survey underscores how important the United States is for India. It is seen as a natural partner in the country's quest for growth. And both countries have many commonalities including democracy, the English language and deep people-to-people ties, manifest in the four million-strong and politically emergent Indian diaspora in the United States. Moreover, for New Delhi the United States is a critical partner in countering China, while for Washington India is a major bulwark against China's aspiration to dominate the Indo-Pacific and central to its strategic thinking.



**Manjeev Singh Puri** is the former ambassador of India to the European Union

The mutual interests of the two countries bring strong positivity, evident in their participation in the Quad and the Indo-Pacific Economic Framework. The launch of the United States-India Initiative on Critical and Emerging Technology to expand their strategic technology partnership and defence industrial cooperation is helping to address a nagging trust deficit between both countries.

**‘Germany must step up its bilateral cooperation in these areas, while respecting India’s strategic autonomy, to enhance their partnership.’**

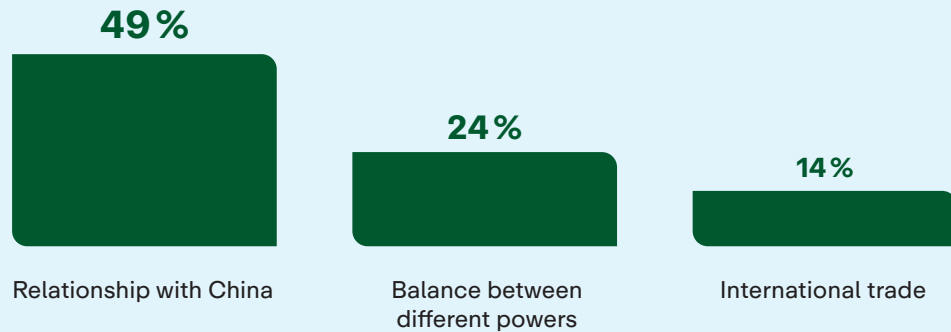
Many Indian experts and policy-makers see technology transfer and economic cooperation as key to taking bilateral ties to even greater heights. A top priority for both sides is to bridge remaining confidence gaps. For instance, the United States still has strong ties with Pakistan, and recently it was on a different page from India on the elections in Bangladesh.

France and Germany are important partners for India, playing a crucial role in strengthening the country's traditional ties with the European Union. Germany is India's largest trade and economic partner, but the strong strategic binding with France sets it in a class apart. It is no surprise that

## India's China concern

### Indian respondents:

What are the three most challenging foreign policy issues for your country?



Indian respondents consider France a more important partner than Germany. Its status as a permanent member of the United Nations Security Council with veto power is particularly important for India, especially on the issue of Kashmir.

**‘The EU’s constant harping on India’s domestic issues means that it is perceived as an important partner but not an all-weather one.’**

France’s strength in military aviation and its willingness to be a differentiated member of the West are important to Indians because they allow India to maintain strategic autonomy in its relations with the West. For India – given the tensions on its borders with China and Pakistan and the contested Indo-Pacific – military, nuclear energy, and space cooperation are key elements for a strategic relationship. Germany must step up its bilateral cooperation in these areas, while respecting India’s strategic autonomy, in order to enhance their partnership.

Given its economic power within the EU, I also hope that Germany will play a much more proactive and pro-India role in the negotiations for an EU-India trade agreement. This would be welcomed by experts in India, who see much to be gained from the conclusion of this agreement.

While the EU remains a major economic partner, its constant harping on India’s domestic issues means that it is perceived as an important partner but not an all-weather one. If the EU and Germany would be more understanding of India’s democracy and appreciative of its role in upholding a rules-based order, including in the Indo-Pacific, their relations would be greatly improved.

India cooperates significantly with Brazil and South Africa at the trilateral, plurilateral and multilateral levels. This is reflected by the fact that most Indian respondents see the G20 and the BRICS+ as groupings that promote global governance and a reform of the UN Security Council.

But, despite several areas of convergence, India’s relations with Brazil and South Africa have not reached their full potential. This is reflected in the survey results, which do not show either country among the five most important bilateral relationships for Indian respondents. This needs to change, and I am optimistic that it will when the IBSA countries work together as the G20 Troika. They also have a special bond with Germany in their efforts to reform the UN Security Council.

Although the four countries are bound by democracy, their geopolitical positions towards each other still stem from historical and economic linkages and are very different. Legacies of colonial rule and civilizational differences – including in ethnicity, language, and religion – also play a role in these asymmetries. Intensified people-to-people contacts along with increased efforts to overcome the anglophone understanding of these countries, particularly India and South Africa, should be useful for Germany.

India is now the world’s most populous country. It has the fifth-largest economy and will become the third largest, overtaking Germany, in the next decade. This places it at the pinnacle of the world and in a unique position compared even to Brazil, Germany and South Africa. The realization of this and the resulting confident foreign policy have been evident in India since the start of the century, and they are now firmly rooted following its successful G20 presidency last year. ↗

# ‘BRICS wants to challenge the G7’

With South Africa’s impending elections, opposition politician Emma Powell sounds the alarm.

**Körber-Stiftung:** You recently said that the West ‘needs to move beyond its echo chambers’. Is the West doing that?

**Emma Louise Powell:** After the Cold War, the developing world received very little attention from the Global North. Because the North thought that the battle for the liberal world order had been won. It was clear from this year’s Munich Security Conference that there is an increasing effort to include voices from the developing world in decision-shaping spaces. And this will safeguard against any attempts to challenge the liberal democratic world order.

**Do you mean attempts by Iran and Saudi Arabia, who have just joined BRICS, of which South Africa is a founding member?**

The party that I represent in parliament, the Democratic Alliance has been vocal in opposing the recent decision by the existing BRICS countries to include Iran. Countries such as Iran and Russia are anchor tenants of the axis of malign actors, and together with their proxies, are working to destabilize many regions throughout the world. This is not an alignment that works in South Africa’s favour.

**Our survey respondents are much less critical of BRICS. For some, BRICS+ it is not about politics and values, but about trade and investment.**

I don’t subscribe to that school of thought, and I don’t believe that such a separation is possible. Let’s look at the facts. There is no single trade agreement among BRICS partners. It is a myth that there is an economic benefit to be derived from BRICS membership that is not possible as a result of already existing multilateral and bilateral agreements outside of the BRICS grouping. BRICS’s key objective is to challenge the predominance of the G7 from an economic and ideological perspective and that, of course, has political consequences.



**Emma Louise Powell** is Member of the South African parliament and shadow minister for international relations and cooperation.

**South Africa is massively dependent on China, which is also a member of BRICS.**

It is true that China is our largest single country trade partner. And South Africa has a trade deficit with China that is not in our favour. This trade relationship is based on the export of commodities and benefits Chinese manufacturing. But regardless of whether or not South Africa remains a member of BRICS, China is not going to stop importing from South Africa. We can comfortably decouple the two as mutually exclusive relationships.

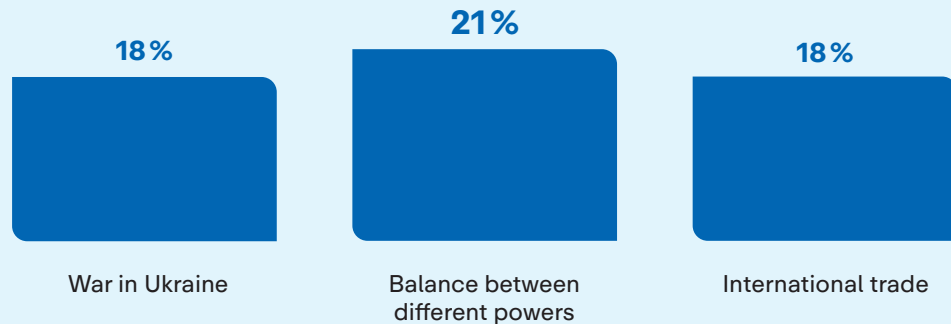
**In our survey, South African respondents consider the African Union (AU) as the most relevant international institution, even more relevant than the United Nations. Does this surprise you?**

It is surprising because the AU is nothing but a talk shop. Look at what’s going on in the Sahel region and what is brewing in the Central African Republic – the AU is doing nothing to stem the tide of violence. The AU’s regional oversight and accountability mechanisms do not work. We simply don’t see African countries utilizing mechanisms from a continental perspective. When was the last time an African state went to the African Court on Human and Peoples’ Rights, and actively used these human rights and justice mechanisms?

## Keeping the Balance

### South African respondents:

What are the three most challenging foreign policy issues for your country?



### **The South African government has accused Israel of breaking the UN Genocide Convention in the war against Hamas after the terror attacks of 7 October. Why is South Africa taking the lead here?**

The Democratic Alliance respects the right of any state to approach the International Court of Justice (ICJ). It is however unclear precisely what has motivated the African National Congress (ANC)-led government to approach the court in relation to the Israel-Hamas war, given the bloodbath unfolding in South Africa's backyard, on the African continent, in countries such as Sudan, and across the Sahel. These regional conflicts have direct consequences for South Africa. We believe the ANC was motivated by political factors, with a genuine desire for justice being an afterthought. We have submitted numerous questions to the minister of international relations to understand whether the government or the ANC received any external funding in relation to lodging and litigating this matter.

### **Some people say Germany is too powerful for Europe but not powerful enough for the world. Does the same apply to South Africa?**

South Africa is not powerful in either regard at this juncture. Our international stature has been significantly eroded by many years of state capture, and a fairly schizophrenic approach to foreign policy in recent years under the leadership of the ANC.

### **Chancellor Olaf Scholz travelled to South Africa and asked President Cyril Ramaphosa to sanction Russia. Ramaphosa declined this request. Did Scholz make a mistake?**

No. Any nation whose constitution is founded on the bedrock of liberal values such as freedom and

democracy would condemn Russia's illegal invasion of a sovereign state and would take countermeasures to ensure that there are consequences. South Africa has not even condemned Russia's illegal invasion, and has positioned itself as a peacemaker of sorts to avoid having to take a position on the war. This is intellectually dishonest, and we see that this position is leading to South Africa's increasing isolation.

### **What would you advise Scholz for his next trip to South Africa?**

Our leaders in parliament were recently warned by a visiting delegation of a European nation that such a country's friendship and generosity is indeed dependent on South Africa's support for Europe's regional security interests. More nations need to follow suit in relaying similar messages to the ANC.

### **What can Germany do to improve relations with South Africa? Our survey shows that technology transfer, access to research and development, and more climate funding might be an option.**

Europe and Germany should be actively investing into civic education and actively promoting democratic ideals on the continent. Any form of investment that would capacitate the private sector and civil society to strengthen oversight mechanisms to ensure that South Africa continues its trajectory as a developing democracy.

Thank you, Ms. Powell. ↩

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The interview was conducted by Jonathan Lehrer

# Power Brings Responsibility

Germany wants to find common ground in a multi-aligned world. But it rejects the idea of a pick-and-choose approach to foreign policy.

The phrase ‘We agree on the analysis but doubt the means employed’ is part of the standard diplomatic lexicon. The Emerging Middle Powers Report 2024 presents a somewhat different picture when it comes to expert communities in Brazil, Germany, India and South Africa: while there is substantial disagreement on the causes of current global malaises, a deeper dive into the proposed solutions suggests growing consensus, particularly on global governance reform.

Germany strongly advocates a free international order based on international law. This position is rooted in self-interest as the existing order underpins our security, prosperity and freedoms. Yet, it is equally in Germany’s interest to promote the evolution of the current system. After all, the benefits are greater when rules and institutions adapt to changing realities.

**‘Backing more actors to have a greater say is a fundamental aspect of our support for a free international order.’**

The urgency and opportunities of decarbonization, as well as climate adaptation, call for more shared resources. This encompasses reforming the international financial architecture and common approaches to capital-market regulation. In addition, disruptive technologies bring enormous promise and unprecedented challenges simultaneously. Artificial intelligence will change how we work, cure diseases and conduct science, but it will also transform warfare, transnational crime and disinformation. Although less publicized, biotechnology could have a similarly profound impact on our lives. The associated risks will require new forms of global governance, and we should think about mechanisms that will allow all countries to benefit from the enormous potential.

A changing reality that traverses all issues is the diffusion of hard and normative power. Representation, decision-making and agenda-setting



**Michael Scharfschwerdt** is the director of policy planning at the German Federal Foreign Office

in global institutions and mechanisms need to reflect this.

This is why backing more actors to have a greater say is a fundamental aspect of our support for a free international order. First, the authority and reliability of the international order depend on actors adhering to its rules and norms. Second, our interconnectedness makes our security, prosperity and freedoms inseparable from those of others. Third, we want powers with expanding means to shoulder greater responsibility for global commons, such as peace and security, sustainability, health, and the right to development.

Certainly, a multipolar world comes with greater complexity and uncertainty. But more players with more power is fundamentally a good thing if they accept their individual responsibilities: this offers the potential for greater contributions to global commons.

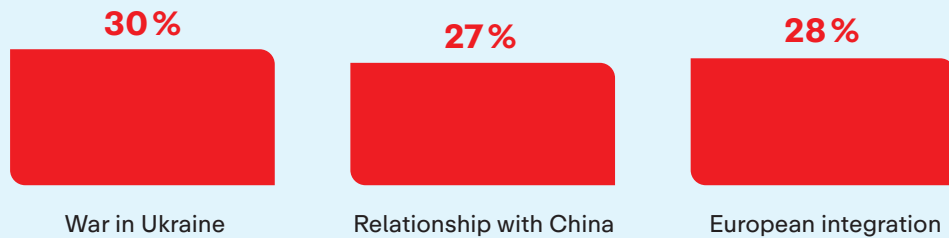
This development increases the need and the opportunities for partnerships complementing the enduring pillars of German foreign policy: European integration, transatlanticism and multilateralism. Thus, we strategically enhance our engagement with powers of global consequence: those with the intent, means and credibility to shape the future free international order, whether holistically, regionally or on key issues.

With this in mind, a ‘one size fits all’ approach is of little benefit. As underlined by the expert

## Greatest challenge: War in Ukraine

### German respondents:

What are the three most challenging foreign policy issues for your country?



polls, countries like Brazil, India and South Africa have diverging interests, means and contexts. Our approach is therefore region-, country- and policy-specific.

Look at any of the topics outlined in Germany's National Security Strategy and you will find collaborative processes with Brazil, India and South Africa at various levels. While our goals remain consistent, there are diverse approaches to contribute to their achievement, as exemplified by the EU-India Trade and Technology Council or the EU-Latin America and Caribbean Digital Alliance.

Even when preferences differ, we still share commonalities on critical sub-issues where we work together through policy-specific groups of friends and processes. This proved pivotal to the success of last year's COP28. The agreement on reforming the World Bank, achieved during India's G20 presidency, played a crucial role in setting the scene. So did energy, climate and transformation partnerships at bilateral, EU and plurilateral levels as well as Germany's efforts for an early agreement on loss and damage pledges. Connecting the dots across bilateral, regional, global and multilateral aspects of cooperation allows for a whole greater than the sum of its parts.

**‘Our increased engagement with countries of global consequence is also a response to China’s approach to the international order and to the war that Russia is waging against Ukraine.’**

As much as we would like our partners to see the world our way, alignment is not a prerequisite for achieving common goals. Also with consequential powers with which our alignment is more limited we see value in working together on issues pertinent to global public goods.

Germany, as an individual country and as a member of the European Union, is ready and capable of engaging in a world where many

consequential actors pursue what some have coined as ‘à la carte’ foreign policy approaches – but we do have our dietary restrictions and the overall menu has to be balanced.

More diffused geopolitical power, the climate crisis and disruptive technologies are major inflection points, but there are others. Our increased engagement with countries of global consequence is also a response to China's approach to the international order and, foremost, to the implications of the war of aggression that Russia is waging against Ukraine.

**‘Diverging assessments of Russia’s repeated violation of international law are problematic.’**

In these respects, the survey shows profound disagreement among the expert communities of Brazil, Germany, India and South Africa. While differing views on China are somewhat to be expected, given different national contexts, diverging assessments of Russia's repeated violation of international law are more problematic. Russia's war on Ukraine undermines sovereign political choices and the inviolability of territorial integrity also on a global scale. Moreover, targeted attacks on the export infrastructure of Ukraine – one of the world's major suppliers of grain and fertilizers – amount to an onslaught on global food security. The inflation propelled by Russia, while undoubtedly harmful to Germany, has had even more severe consequences for less affluent countries.

We believe that powers of global consequence have the ability and the responsibility to stand up for the global commons. This is not a defensive endeavour to maintain the status quo but rather an effort to adjust elements of the current system to align with common global challenges: for an international order that is reliable yet dynamic, and for the credibility of global rules to constitute an order that can be leveraged to the benefit of all. ↩

# The Perfect Recipe?

Brazil has the right strategy to survive in a world full of crises: Unite with many to deliver for all.

Few countries owe more to diplomacy than Brazil. Our foreign policy is a reflection of who we are as well as our place in the global community. A democratic, multicultural, multi-ethnic nation of the Global South, sharing borders with ten other South American countries with whom we have coexisted in peace for over 150 years. Our borders were defined by negotiation and peaceful settlement, not by wars of conquest.

This translates into the fundamental tenets of Brazil's foreign policy: peaceful settlement of disputes, non-intervention, multilateralism, cooperation, sustainable development, regional integration, and the primacy of human rights and international law. By upholding these principles, we aim to play a constructive role in our region and on the global stage. Furthermore, Brazil is among the most biologically diverse countries in the world, it is a major player in global agriculture and food production, and it has the cleanest energy matrix of the G20. We face, however, huge challenges in terms of inequality. Given all these factors, sustainable development is the key to all our public policies.

**‘One of the key challenges with China is to diversify our trade to achieve a more balanced pattern of exchange.’**

Under President Lula's government, Brazilian foreign policy was repositioned to address today's global challenges. The starting point was in our own region. Brazil promptly returned to the Community of Latin American and Caribbean States (CELAC) and the Union of South American Nations (UNASUR). Relations with Venezuela were normalized. The president's first bilateral visits were to Argentina, Paraguay and Uruguay, our strategic MERCOSUR partners. Regional integration was relaunched by a summit of South American heads of state held in Brasília.

Another important initiative was the Amazon Summit for Sustainable Development, held at



**Sérgio Rodrigues dos Santos**

is the head of policy planning in the Ministry of Foreign Affairs of Brazil.

the heart of the forest, in the city of Belém. Heads of state of member countries of the Amazon Cooperation Treaty Organization came together to adopt a joint plan of action to promote sustainable development in the region. The summit was also the first step in preparing the way for the COP30, which will also take place in Belém, in 2025.

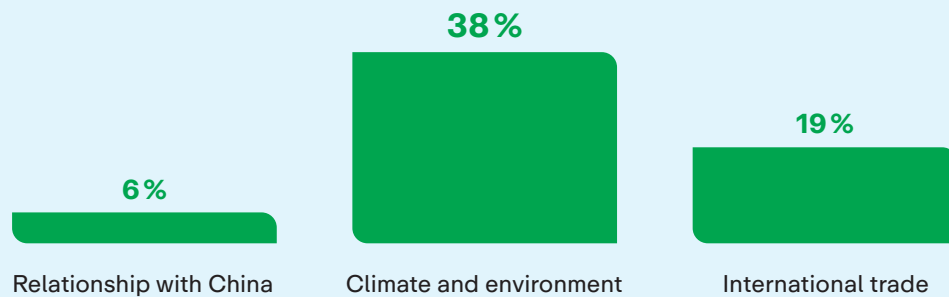
Brazil has also revitalized relations with traditional partners such as the United States, China, India, Russia, South Africa, Germany and France, as well as with the Global South as a whole, with a renewed focus on Africa. It is interesting to note that these countries are largely the same as those identified in the first Emerging Middle Powers survey. This is in line with two other important features of our foreign policy: its universal stance and the use of variable-geometry coalitions to pursue national interests. In the case of China, our top trading partner since 2009, we have had a strategic partnership since 1993 with a comprehensive cooperation portfolio, ranging from joint satellite development and infrastructure connectivity to reindustrialization and energy efficiency. Not surprisingly, the Emerging Middle Powers survey shows that perceptions of our bilateral relationship are positive. Still, one of the key challenges with China is to diversify our trade to achieve a more balanced pattern of exchange.



## Climate crisis dominates

### Brazil respondents:

What are the three most challenging foreign policy issues for your country?



On the multilateral front, Brazil's positions on issues such as peace and stability in the Middle East, gender equality and women's empowerment were also realigned with our traditional stance. One example is the Israeli-Palestinian conflict. Brazil reasserted its historical position based on international law and the two-state solution. This allowed the country's diplomacy to play a constructive role in the negotiations for a humanitarian ceasefire between Israel and Hamas during Brazil's presidency of the United Nations Security Council in October 2023.

**‘Brazil reasserted its historical position based on international law and the two-state solution.’**

With regard to the BRICS, we see the group as a platform to coordinate political and economic cooperation focused on the needs of the countries of the Global South. The New Development Bank, for example, has so far approved around 96 infrastructure and sustainable development projects worth over US\$32.8 billion. The BRICS is also key to reforming global governance and multilateral institutions. The group envisages a multipolar world order centred on the United Nations Charter and international law.

The expansion of the BRICS in 2023 was a major turning point. One of the criteria adopted for new members is the commitment to refrain from applying unilateral sanctions against any country. Another positive development is the renewed call to reform of the United Nations Security Council, including by reflecting the aspirations of Brazil, India and South Africa for a greater role in that body. Brazil is fully engaged in the workings of the

newly expanded BRICS as the country will be taking over its presidency in 2025.

Brazil currently holds the presidency of IBSA, the dialogue forum it is a member of alongside India and South Africa, which is dedicated to South-South cooperation with an emphasis on least developed countries in Africa, Asia and Latin America. We also aim at reinforcing triangular cooperation with countries of the North. Even though the principles underpinning South-South and North-South cooperation may differ in many aspects, they can also be complementary and reinforce one another. Countries such as Germany, with its strong record of technical and financial cooperation, can play an important role in this process.

**‘Countries such as Germany, with its strong record of technical and financial cooperation, can play an important role.’**

The G20 presidency is Brazil's top foreign policy priority for 2024. Reducing inequality in all its forms is at the core of our agenda, which will be structured around three pillars. First is social inclusion and the fight against hunger and poverty. We want to respond to the setbacks in the 2030 Agenda, as increasing inequality, within and among nations, is a major driver of today's global challenges. The focus will be on the articulation of a Global Alliance against Hunger and Poverty.

The second pillar is the promotion of sustainable development in all its three dimensions (social, environmental and economic) as well as energy transitions. The G20 is in a critical position to ensure that we adopt more ambitious Nationally

Determined Contributions at the COP30, coupled with the adequate means of implementation. With that goal in mind, the Brazilian presidency has established a Task Force for the Global Mobilization Against Climate Change.

The third pillar is the reform of global governance. There is no question that global governance institutions need to be made more representative and effective. For instance, the International Monetary Fund and World Bank boards each had 12 seats for a total of 44 member states when they were established. Today, that ratio is 25 to 190. As for the United Nations, entire regions of the world are excluded from the Security Council's central decision-making processes. Not a single African or Latin American and Caribbean country occupies one of its permanent seats.

**‘Entire regions of the world are excluded from the Security Council. Not a single African or Latin American and Caribbean country occupies one of its permanent seats.’**

In this respect, the Emerging Middle Powers survey reveals that the criticism levelled against the current configuration of the international system

is not only a matter of concern for governments but also for domestic constituencies at large. The G20 is considered one of the best-equipped arrangements to deal with global challenges. Given that it is an informal body with no budget, personnel or secretariat, we can probably assume that this perception stems from its democratic decision-making process and diverse membership.

**‘Germany and Brazil will not have the same position on every issue of the international agenda.’**

This is the sort of discussion where traditional partners such as Brazil and Germany can play a critical role. Naturally, our countries will not have the same position on every issue of the international agenda. Nevertheless, we can work together in addressing topics such as climate change, energy transition, trade (with the MERCOSUR-EU Association Agreement, for example) and global governance reform, to name but a few. ↗

The views expressed in the present article reflect the author's positions and not necessarily those of the Brazilian government.

# Emerging Middle Powers Survey

An expert survey on attitudes to foreign policy in Brazil, Germany, India and South Africa

## Foreign policy from the top

Who shapes the foreign policy of your country the most?

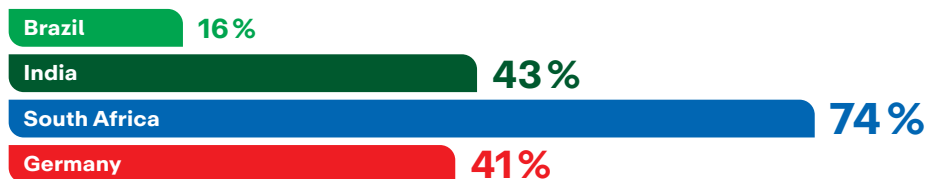
Ministry of Foreign Affairs



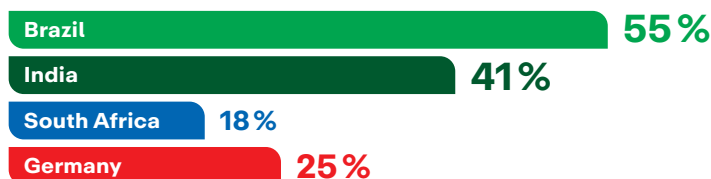
Head of government



Ruling political parties



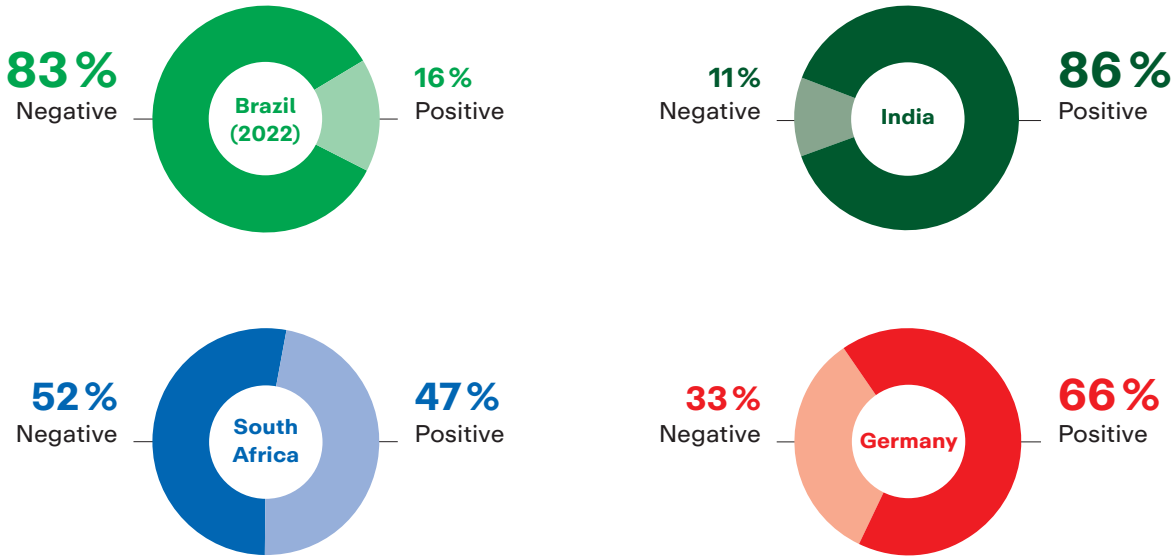
Business sector



answer 'don't know' and 'no answer' ranged from 0 to 2 per cent for all issues

**From praise to scepticism**

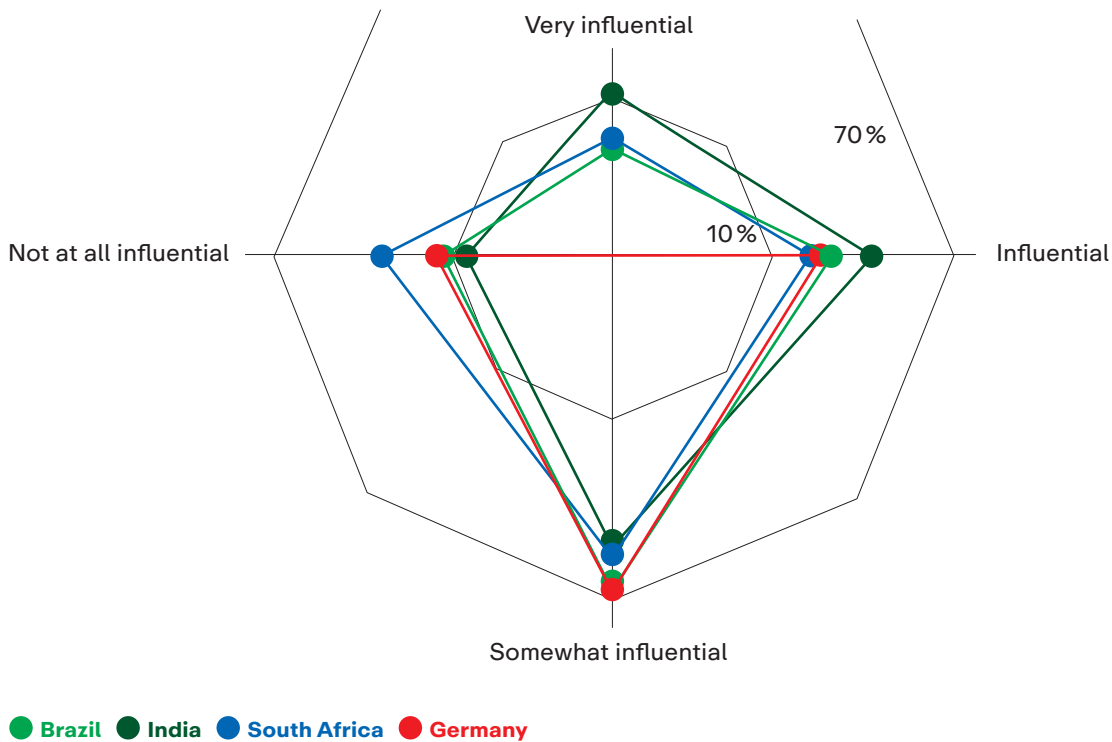
How do you rate your government's handling of foreign policy over the past year?



answer 'don't know' and 'no answer' ranged from 1 to 3 per cent for all issues

**India, the confident**

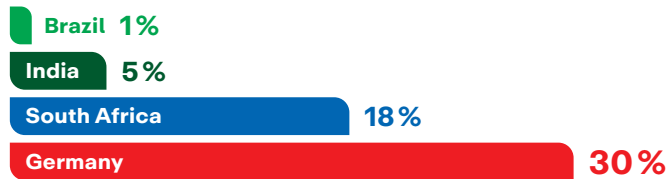
How do you rate your government's influence on global rulemaking?



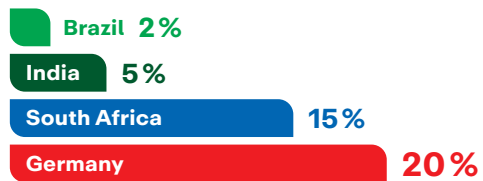
## Same world, different crisis

What are the most challenging foreign policy issues for your country?

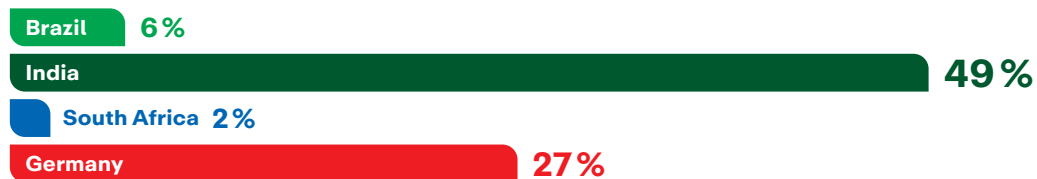
War in Ukraine



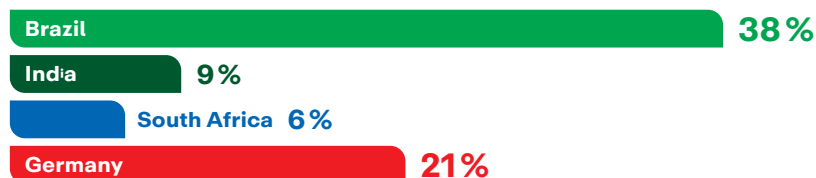
War in Middle East



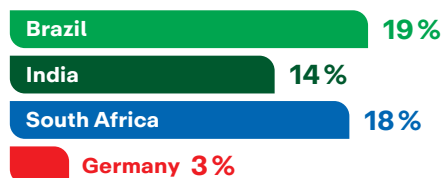
Relationship with China



Climate and environment



International trade

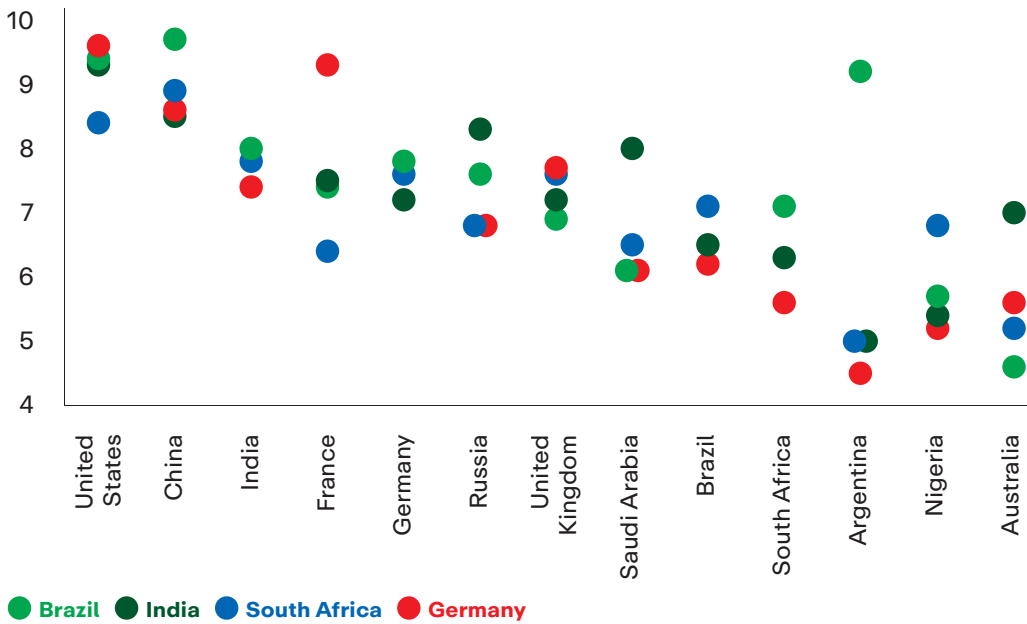


answer 'don't know' and 'no answer' ranged from 2 to 8 per cent for all issues

## Superpowers matter

How important are your bilateral relations with ... ?

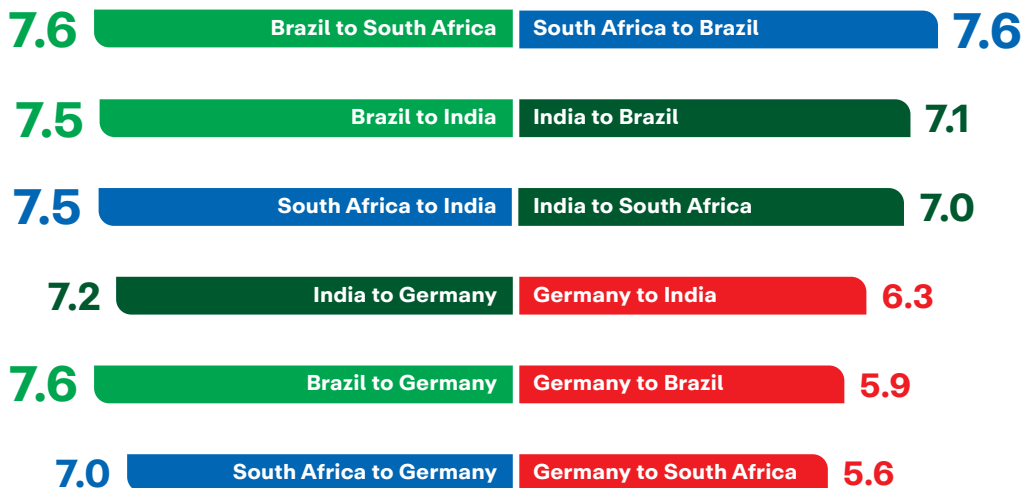
extremely important



answer 'don't know' and 'no answer' ranged from 0 to 4 per cent for all issues

## Perfect match: South Africa and Brazil

How do you rate your country's current relationship with the following country?

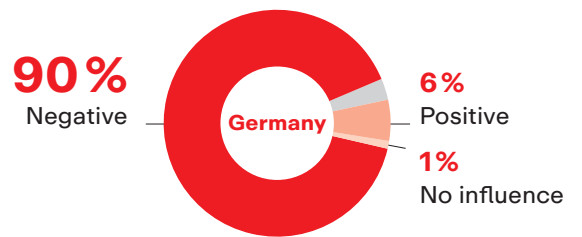
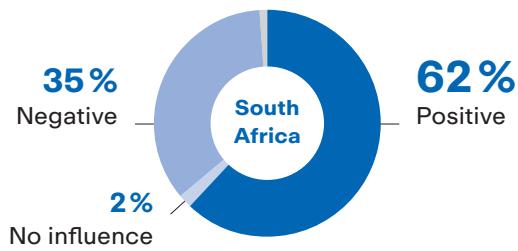
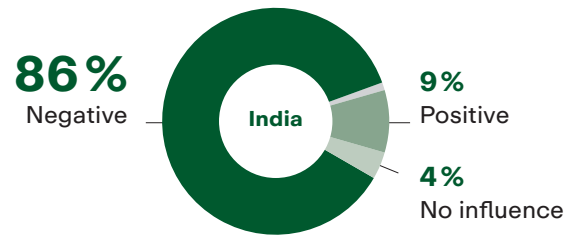
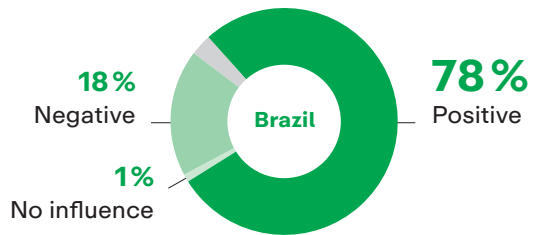


Scala from 1 to 10, 10 means 'very good'

answer 'don't know' and 'no answer' ranged from 0 to 6 per cent for all issues

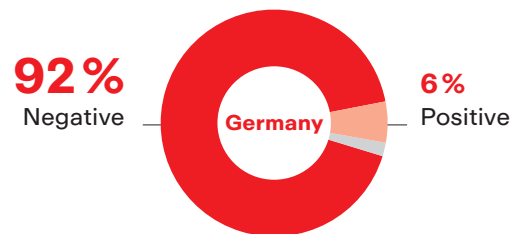
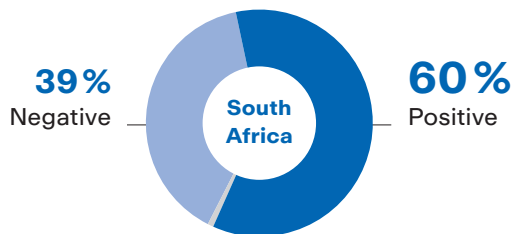
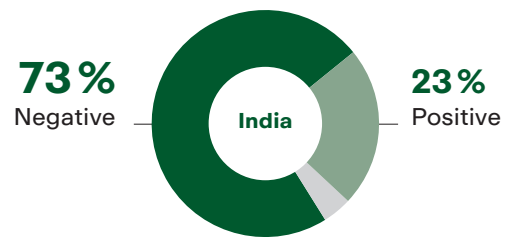
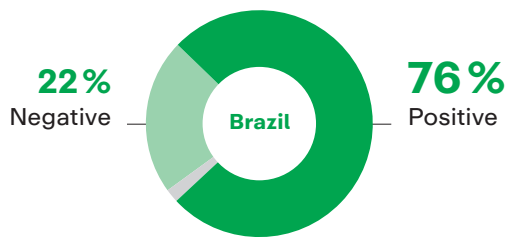
**Not all China sceptics**

How do you evaluate China's influence in your country?



answer 'don't know' and 'no answer' ranged from 1 to 3 per cent for all issues

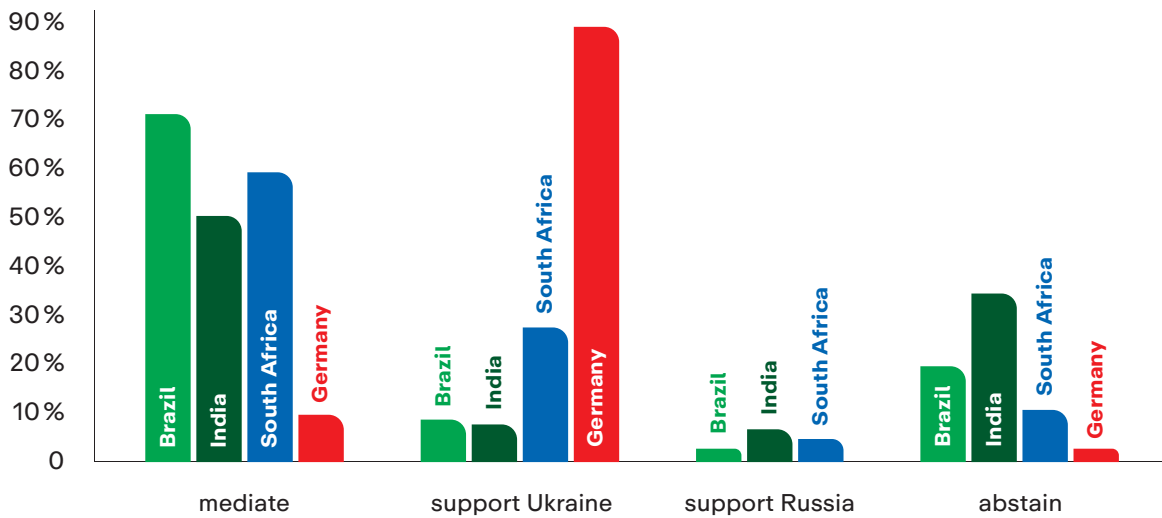
How do you evaluate China's influence globally?



answer 'don't know' and 'no answer' ranged from 1 to 4 per cent for all issues

## Divided on Ukraine

On the Russia-Ukraine war, your country should ... ?

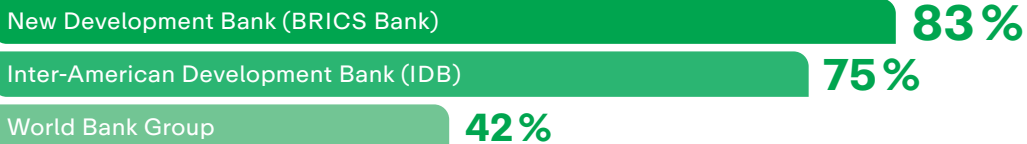


answer 'don't know' and 'no answer' ranged from 0 to 3 per cent for all issues

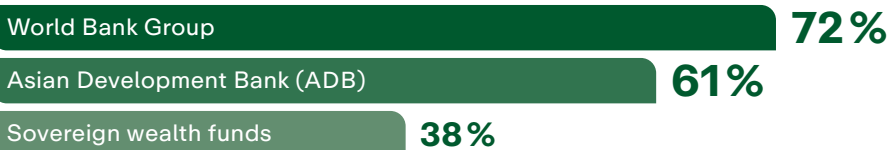
## Regional development banks deliver

Which financial institution serves the economic interests of your country?

### Brazil



### India



### South Africa



### Germany



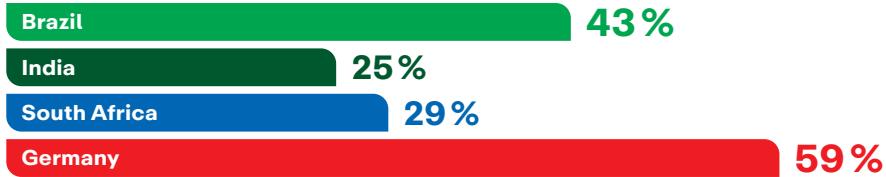
none of those institutions 1-2, answer 'don't know' and 'no answer' ranged from 4 to 10 per cent for all issues



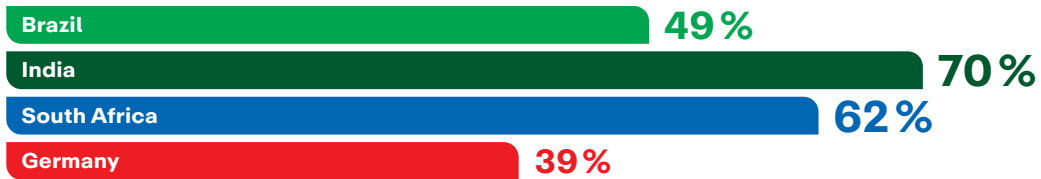
## No to protectionism

How should your country approach trade?

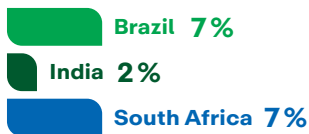
Support the World Trade Organization and multilateral trade agreements



Diversify through bilateral trade agreements



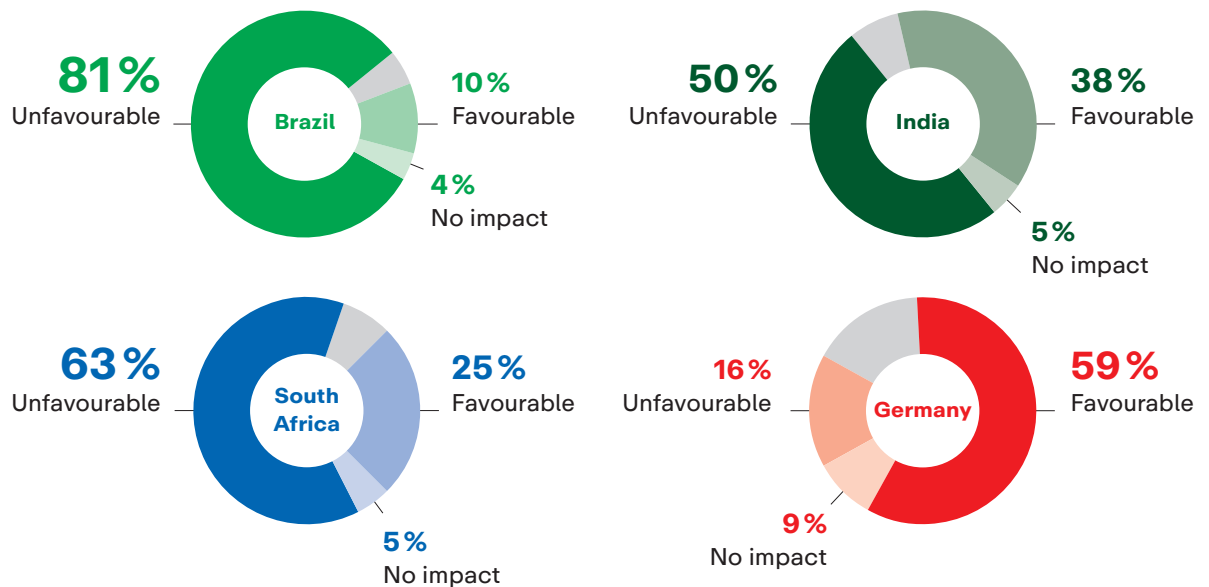
Prioritize protectionism



answer 'don't know' and 'no answer' ranged from 1 to 3 per cent for all issues

## Disapproval for US dollar dominance

How would you describe the dominance of the US dollar?



answer 'don't know' and 'no answer' ranged from 5 to 16 per cent for all issues

## Private sector participation, global public investment and tech transfer fuel the SDGs

How can governments achieve the Sustainable Development Goals?

### Brazil



### India



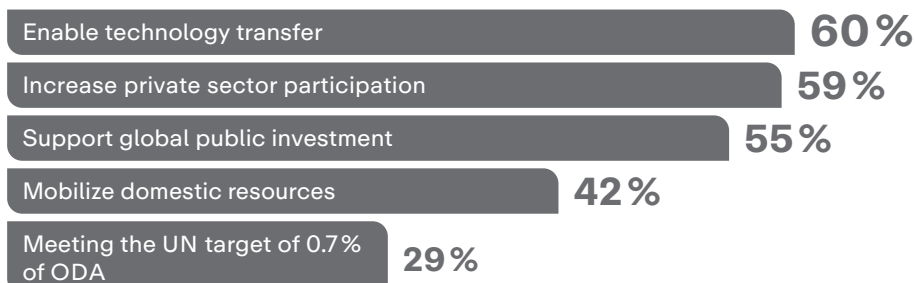
### South Africa



### Germany



### Average



answer 'don't know' and 'no answer' ranged from 1 to 6 per cent for all issues

## US-China standoff

How would you describe the current global power distribution?

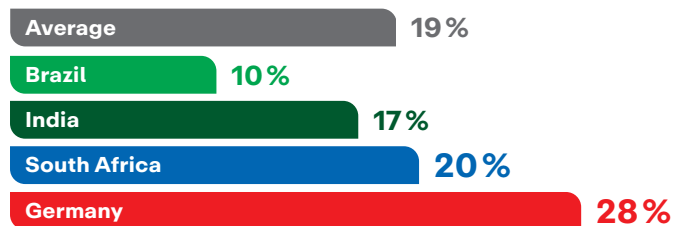
Distributed between the United States and China



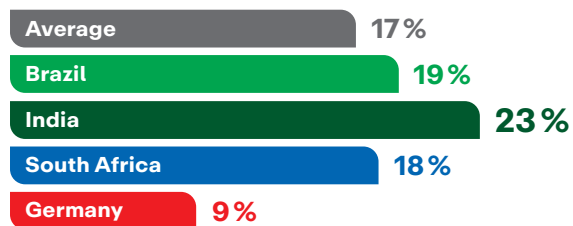
Distributed between many different powers



Dominated by the United States



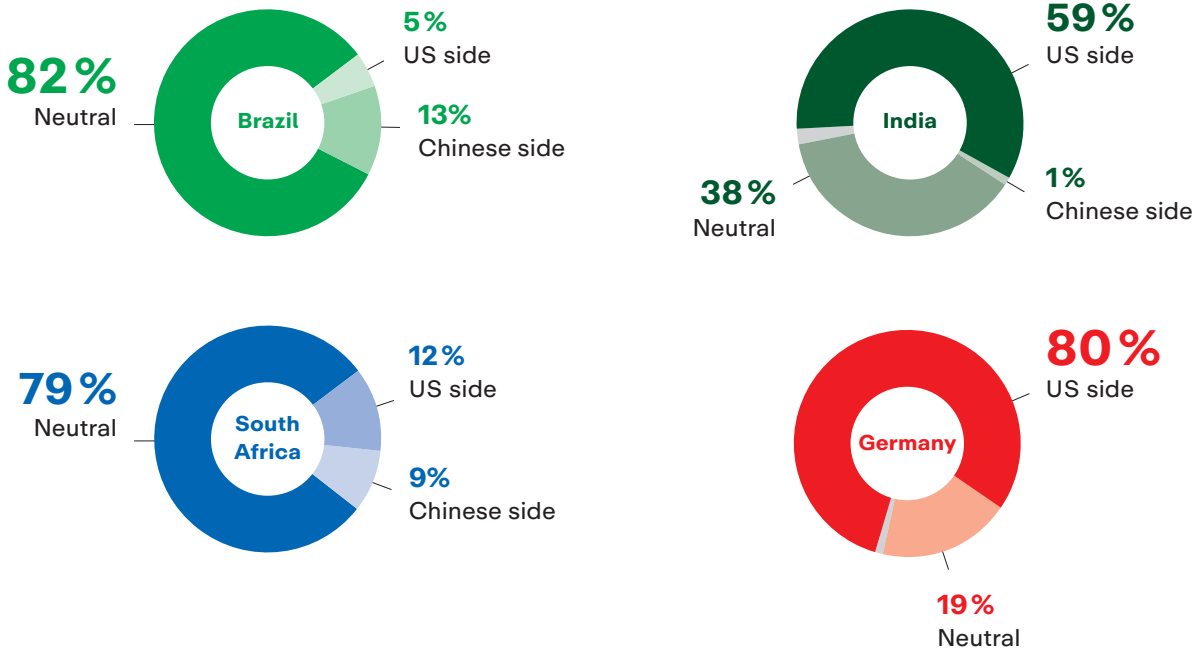
Distributed between the United States, China and Russia



answer 'don't know' and 'no answer' ranged from 0 to 2 per cent for all issues

## China on its own?

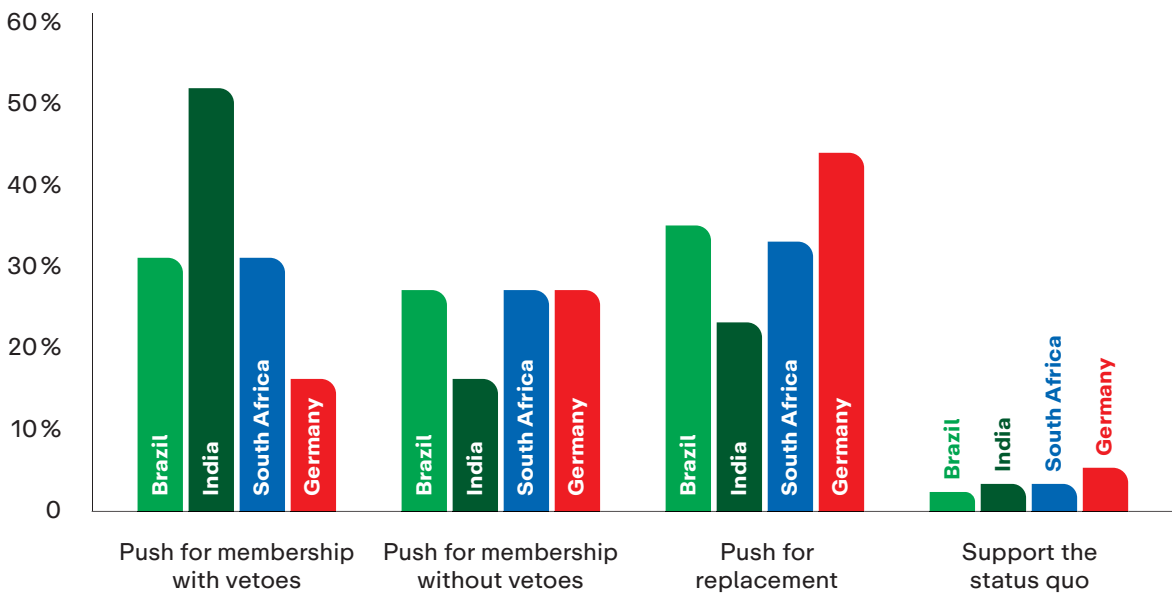
How should your country position itself amid growing US-China rivalry?



answer 'don't know' and 'no answer' ranged from 0 to 2 per cent for all issues

## No more status quo!

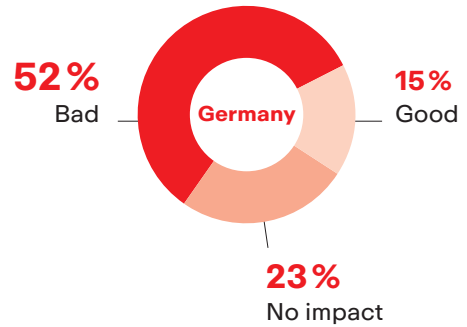
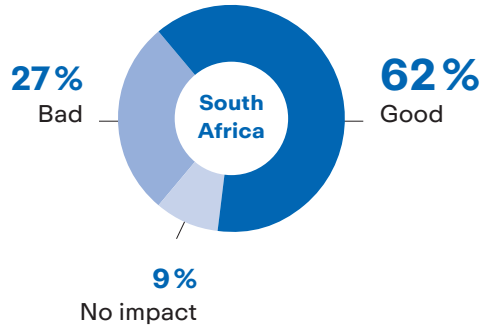
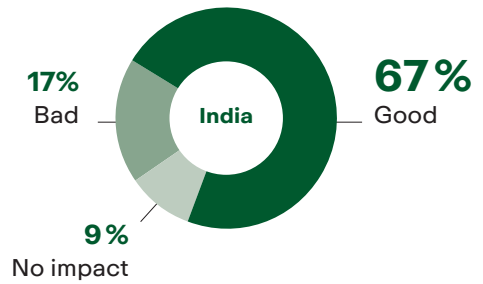
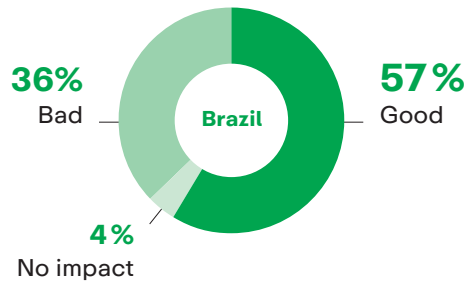
With regard to the United Nations Security Council, what should your country do?



answer 'don't know' and 'no answer' ranged from 5 to 8 per cent for all issues

### Expansion endorsed

What do you think of the BRICS expansion?



answer 'don't know' and 'no answer' ranged from 3 to 10 per cent for all issues

### Hope rests on the G20

In ten years, which institutions or groups will tackle challenges most effectively?

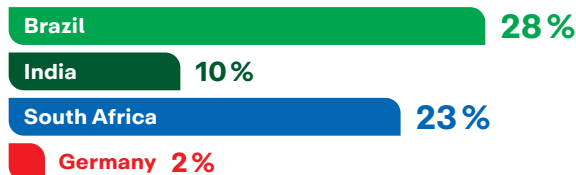
G20



United Nations



BRICS+



G7



answer 'don't know' and 'no answer' ranged from 1 to 5 per cent for all issues

## Unanimous desire for reform

Are you in favour of the following actions?

More seats on the United Nations Security Council



IMF reform



Debt restructuring



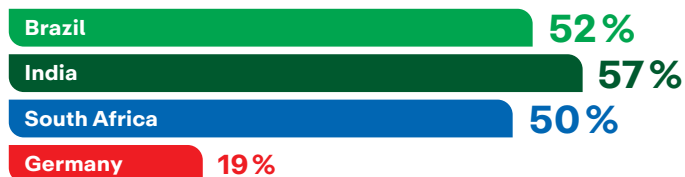
Creation of new funds with their own governance structure



Further G20 expansion



Further BRICS expansion



answer 'don't know' and 'no answer' ranged from 1 to 26 per cent for all issues

## IBSA bringing up the rear

What should Germany do to improve its relations with low- and middle-income countries?

Support open research and development



Increase economic assistance and development cooperation



Enable technology transfers



Increase political and financial support to loss and damage and adaptation to climate change



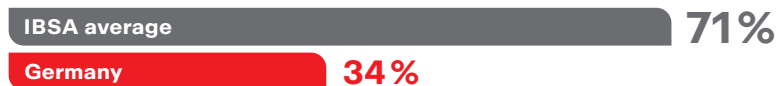
Offer trade concessions



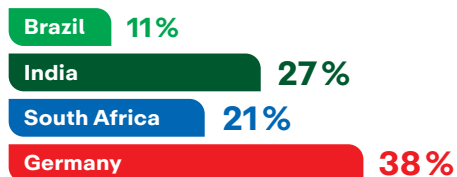
Take the lead in reforming multilateral institutions



Loosen development aid conditionality



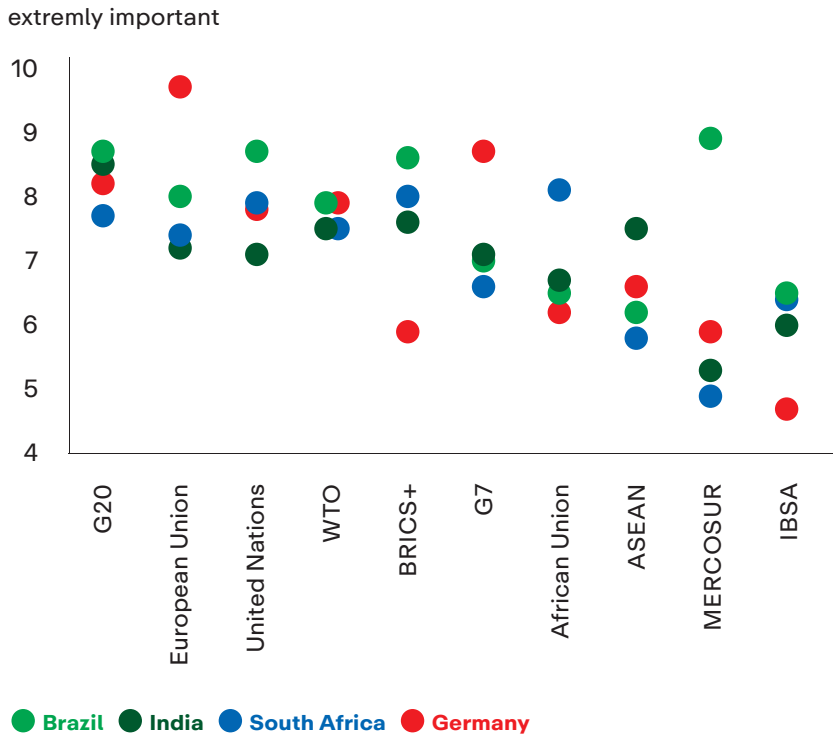
Offer military assistance



answer 'don't know' and 'no answer' ranged from 0 to 9 per cent for all issues

## Unlocking partner potential

How relevant are the following international institutions and groupings for your country?



answer 'don't know' and 'no answer' ranged from 0 to 51 per cent for all issues

	Brazil	India	South Africa	Germany
Base unweighted (number of participants)	280	191	205	246
Think tank/academia	59	31	40	31 %
Private sector	7	30	7	7 %
Government	14	5	10	18 %
NGO	6	4	16	10 %
Media	3	9	12	9 %
Diplomacy	3	6	7	9 %
Other	8	13	7	15 %

	Brazil	India	South Africa	Germany
Base unweighted (number of participants)	280	191	205	246
Foreign policy	20	19	29	43 %
Defence and international security	16	9	11	18 %
Economy and foreign trade	12	15	10	14 %
Development cooperation	11	3	4	5 %
Other	40	49	45	18 %

answer 'don't know' and 'no answer' ranged from 0 to 5 per cent for all issues



# The Berlin Pulse

## German Foreign Policy in Perspective

In our annual flagship report ‘The Berlin Pulse’, we present foreign policy positions of the German public along with perspectives by international leaders and experts who express their hopes and expectations of German foreign policy. The current issue of ‘The Berlin Pulse’ discusses paradigms and power shifts, as the war in Ukraine has forced Germany to readjust its foreign policy paradigms, while the global distribution of power is shifting and reshaping multilateral decision-making.

### Citation

If you want to cite the survey results, editorial or policy recommendations, please use the following citation:  
Ganter et al. 2024.

The survey was commissioned by Körber-Stiftung and conducted by Verian Germany between 16 October and 29 November 2023. The interviews were conducted online. The sample is neither representative nor random. The group of people invited to participate in the survey includes government representatives, members of parliament, the military and judiciary, diplomats, journalists, researchers, senior NGO staff, activists, and private sector representatives from Brazil, India, South Africa, and Germany. Participants were invited individually by Körber-Stiftung or its cooperation partners in Brazil (BRICS Policy Center), India (Gateway House Indian Council on Global Relations), and South Africa (South African Institute of International Affairs). Various methods were used to encourage response, including multiple contact attempts and the incentive of receiving survey results. To ensure that respondents didn't participate twice, each survey link could only be used once. Questions were identical in each country. The survey was conducted in Portuguese in Brazil, in German in Germany, in Hindi and English in India, and in English in South Africa.



All data are available at  
[www.koerber-stiftung.de/en/projects/koerber-emerging-middle-powers-initiative/](http://www.koerber-stiftung.de/en/projects/koerber-emerging-middle-powers-initiative/)



Lithuanian foreign minister Gabrielius Landsbergis, German foreign minister Annalena Baerbock, and Indian minister of external affairs Subrahmanyam Jaishankar together with Thomas Paulsen, Körber-Stiftung and The Berlin Pulse.

# Körber Emerging Middle Powers Initiative

The aim of our Körber Emerging Middle Powers Initiative (KEMP) is to promote dialogue between Germany and emerging middle powers, such as Brazil, India, and South Africa. With their growing political, economic and demographic weight they are key players for global problem solving and also form the G20 troika in 2024.

The Russian invasion of Ukraine has shown that in Germany, among other places, geopolitical perspectives, foreign policy traditions, and national interests of emerging middle powers are often not assessed in a realistic manner.

To address this, the initiative conducts an annual expert survey and facilitates various

dialogue formats in cooperation with Gateway House India, the Brazilian BRICS Policy Centre and the South African Institute of International Affairs. Through these activities, the initiative contributes to a deeper understanding of the geopolitical perspectives of emerging middle powers.

The KEMP Initiative aims to bridge this knowledge gap by bringing together experts and decision-makers from our partner countries and other emerging middle powers with their German counterparts, fostering an active exchange and a deeper understanding of these perspectives and traditions.



**Paulo Esteves**  
Member, Academic Council,  
BRICS Policy Center;  
Associate, Professor,  
Institute of International  
Relations, Pontifical  
Catholic University,  
Rio de Janeiro



**Manjeet Kripalani**  
Executive Director,  
Gateway House Indian  
Council on Global  
Relations



**Julia Ganter**  
Programme Director  
International Affairs,  
Körber-Stiftung



**Jonathan Lehrer**  
Programme Manager  
International Affairs,  
Körber-Stiftung



**Steven Gruz**  
Head, African Governance  
and Diplomacy Programme,  
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