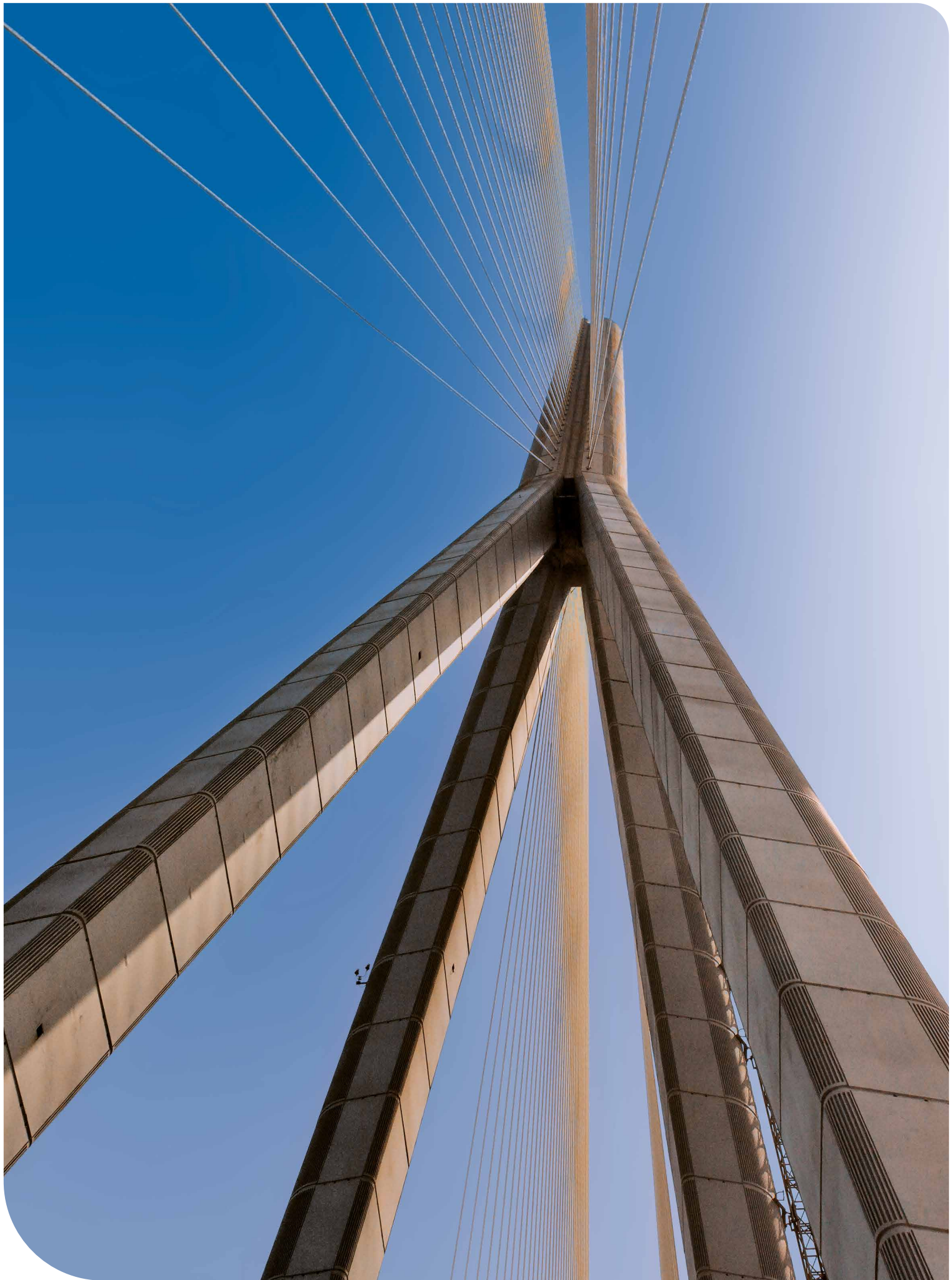


Momentum for Middle Powers

Emerging Middle Powers Report 2025





Middle Power Thinking

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

77% of Brazilian and **73%** of South African respondents view China's global influence positively, compared with **33%** in India and **22%** in Germany.

52% of Indian respondents say India prefers neutrality amid the growing China-US rivalry (up from 38% last year).

60% of South African respondents view the global influence of the United States negatively.

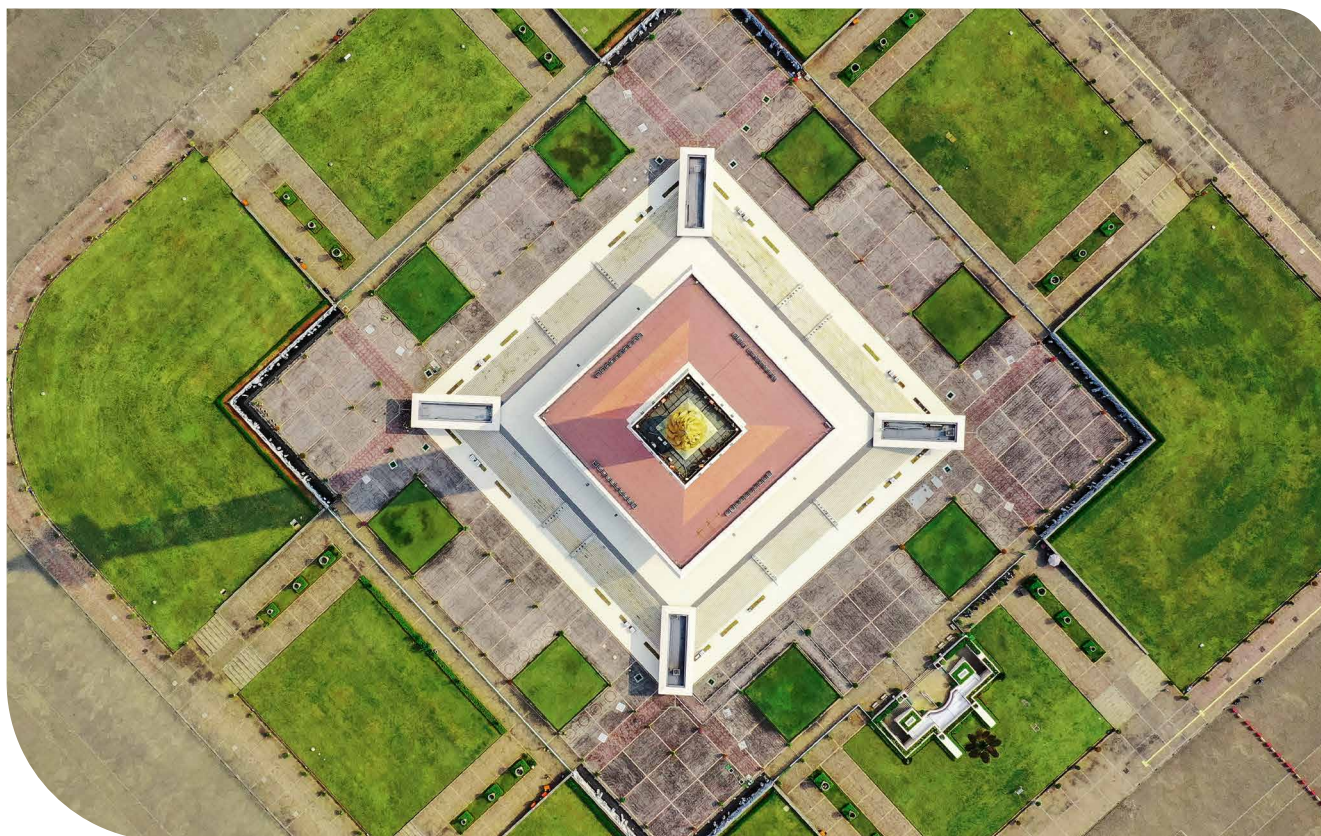
Only Brazilian respondents mention **climate** and the **environment** among the top three foreign policy priorities for their country.

Around **70%** of respondents in Brazil and South Africa as well as **60%** in India say their country is not spending enough to protect the environment.

In all four countries, around **60%** of respondents are pessimistic about major reforms of international institutions.

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A New Momentum For Middle Powers

Why bother with emerging middle powers when most of the international discussion since Donald Trump took office for the second time is dominated by the great-power politics of the United States and its global implications? Because the world is undergoing profound transformations that are not being driven only by the United States, China or Russia. Small and medium-sized states no longer participate in global affairs at the whim of great powers: they are carving out a legitimate place for themselves in the emerging new order. This second edition of our annual *Emerging Middle Powers Report* is a reminder that the signs of the times must be read accordingly; that is, as showing a new momentum for middle powers.

A closer look at the geopolitical situation and experts' opinions in India, Brazil, South Africa, and Germany, helps to describe this dynamic.

From **India's** point of view, the United States' focus on domestic renewal and retreat from acting as the world's police officer opens up the opportunity to expand its relationships and understandings with great and middle powers, as well as with its emerging middle power peers and developing countries. A multipolar order is beneficial for India, as it is for most emerging middle powers. The country no longer needs to tie itself to the giant trade pacts signed by powers that have shaped the global trade regimes so far and whose practices Indian respondents to our second Emerging Middle Power expert survey consider unfair. Nor does it need to form military alliances or to take geopolitical sides. Instead, India has the confidence and capacity to reinforce or to reassess its vision of strategic autonomy, which it is now doing.

Brazil hosted the G20 Summit in late 2024 and it will also play a significant role in 2025 with its BRICS presidency and hosting of COP30. This year again, responses from the country in our expert survey show fatigue regarding its relationships with Europe and with the United States. If Brazil's policy options are constrained by a potential rejection by the EU of the long-negotiated trade agreement with Mercosur and by the unilateral behaviour of the Trump administration, it is expected to seek to intensify and diversify its other partnerships, including within BRICS. One example is its aim to develop 'complementary, voluntary, accessible,

transparent and secure payment platforms' during its BRICS presidency. As it is for India, autonomy is a crucial aspect of Brazil's foreign policy. A multipolar system is seen as a way to diversify and to balance its relationships and interactions with major powers while broadening its foreign policy space.

From **South Africa's** perspective, the desire for multilateral cooperation in a much-divided world has assumed greater importance than ever. It has a major task in 2025 in presiding over the G20, amid deteriorating relations with the United States – only 40 per cent of South African experts in our survey see Washington's global influence as positive – and growing distrust between Western states (although not Donald Trump's administration) and Russia. Like India and Brazil when they held this G20 role in the past two years, South Africa will see its diplomatic skills put to the test in trying to find common ground between often opposing viewpoints, as it steers a gathering of states that our expert survey respondents say will be even more important in the years to come.

In **Germany**, too, there are signs of a fundamental rethink regarding its relations with the great powers, especially with its traditional ally, the United States. The term 'de-risking' has become standard vocabulary on many fronts. First, it is used regarding Russian oil and gas and, then, increasingly with regard to dependence on China for its market and supply of critical minerals. The speech of US Vice President J.D. Vance at the Munich Security Conference and the Trump administration's rapprochement with Russia have accelerated this rethink, also with regard to the United States, even if involuntarily. These developments force Berlin in a direction where balance by strengthening partnerships, especially with emerging middle powers, with their unique access to the Global South, becomes inevitable. In Germany, a country that has highlighted the transatlantic alliance whenever possible, the share of respondents who say they prefer neutrality or non-alignment over siding with the United States or China has increased from 19 per cent to 29 per cent in just one year.

It is easy to explain why the world is in the midst of a new middle-power moment, but it is more

difficult to say how this moment should be shaped. With the United Nations stuck without a meaningful reform process in sight, the question is how middle-power cooperation can be effectively organized to ensure reform towards a responsive multilateral system that works for all, as well as to update international norms and principles to make them fit for today's world. Two dimensions can provide some answers: First, a look back at a key moment in the history of multilateralism and South-South cooperation from 70 years ago. Second, how experts from the three surveyed emerging middle powers and Germany think about the most challenging issues, partnerships and the international system.

Reviving the Bandung Spirit of 1955

In 1955, leaders from 29 African and Asian countries, many of which had recently emerged from colonial rule, met in Bandung, Indonesia, for the Asia-Africa Conference to explore the potential for cooperation among themselves and to continue the process of decolonization. The conference laid the groundwork for the Non-Aligned Movement as well as the Group of 77 and was a third way beyond great-power confrontation. Bandung's outcome showed that emerging middle powers can be a significant force in international politics. The ten Bandung Principles, including respect for the sovereignty and territorial integrity of all countries and no intervention or interference in the internal affairs of another country, as well as the commitment

to economic cooperation, are today more relevant than ever.

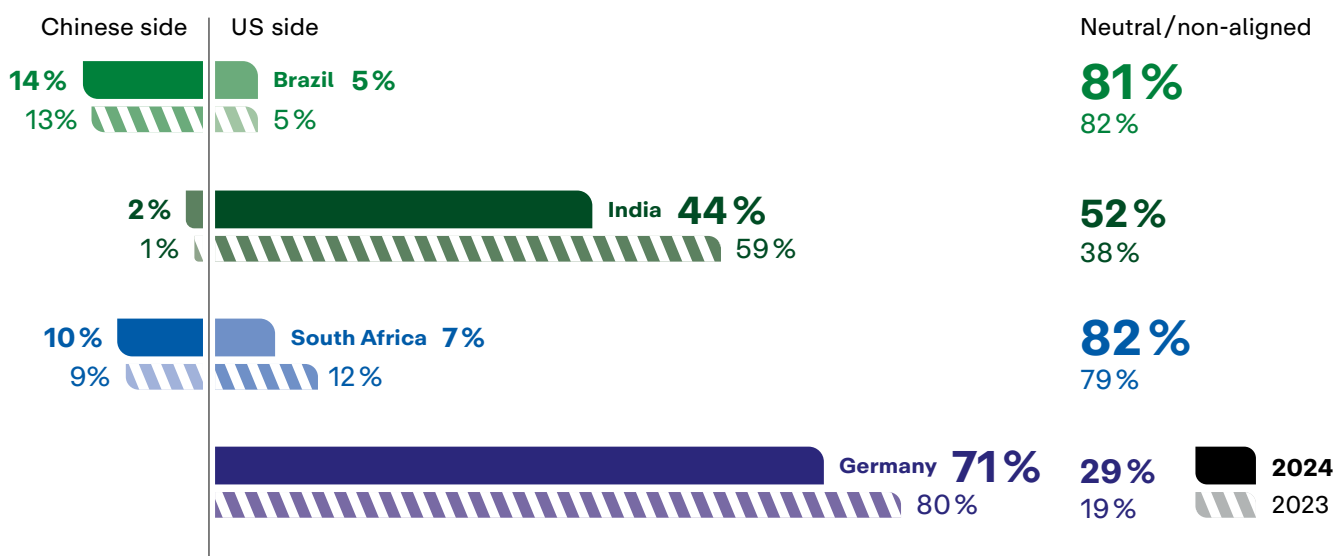
Bandung sent a strong signal from African and Asian countries about the then ten-year-old UN Charter as they underlined their commitment to its key tenets in three of the Bandung Principles. While this reassurance was necessary in 1955, a revival of the Bandung spirit 70 years later must include ideas for adapting these principles to today's reality, especially regarding reformed multilateralism and its unresolved issues like equitable development, technological parity, energy security and environmental degradation.

Acknowledging the benefits of a multipolar system in 2025 entails recognizing that, beyond the actions of the Trump administration, recent reductions in development aid signal a clear trend of developed countries retreating from historical commitments and responsibilities. With its domestic budgetary constraints, Germany may not follow the United States' latest path, but it must view its aid spending as strategic investment in a post-transatlantic era. Emerging middle powers may also step in to fill this growing gap and spearhead a broader effort to redefine international responsibilities.

While institutionalized regionalism was in its early stages in 1955, the likes of the Association of Southeast Asian Nations (ASEAN), the Gulf Cooperation Council (GCC) and later on Mercosur and the African Union (AU) have since shown the growth and strategic advantages of coordination among emerging middle powers. It will be fruitful

Pivot to non-alignment?

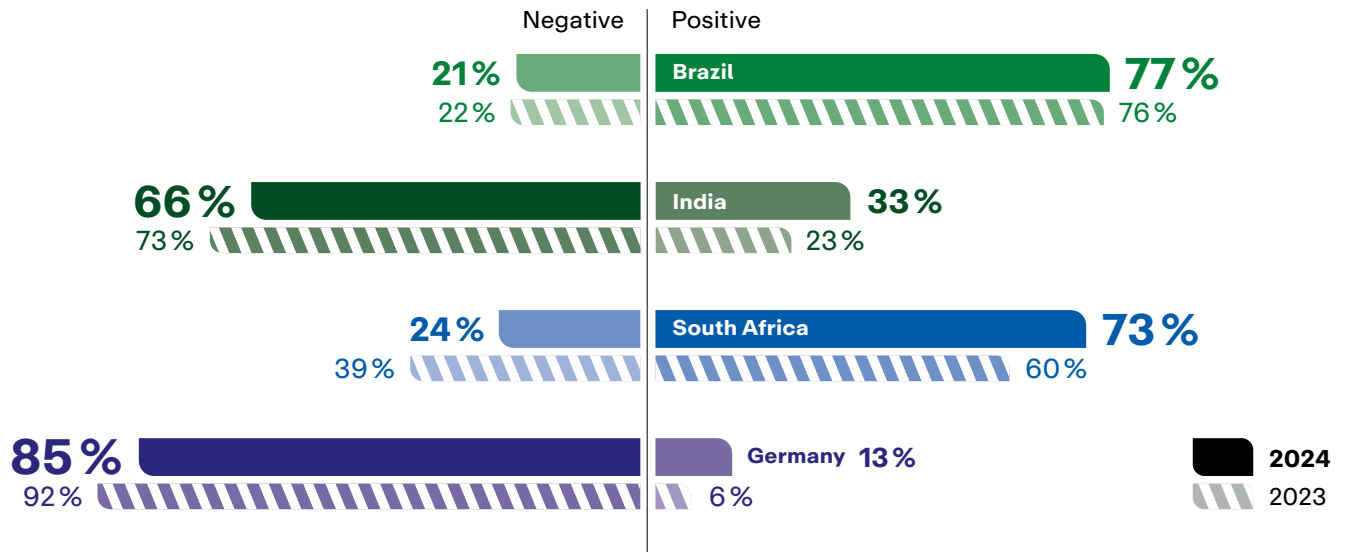
How should your country position itself amid growing Chinese-US rivalry?



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

Less China scepticism

How do you evaluate China's influence globally?



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

for these powers and Germany, with its regional track record in the European Union, to share their knowledge and experience. First, to resolve the internal difficulties of these regional organizations by finding common ground, and second, to enhance their impact by setting their goals in accordance with the changed geopolitical picture. This is also true for cross-regional groupings, such as BRICS, where the most recent newcomers, like Egypt or Indonesia, need to work out how they can use their membership effectively for real change in their region.

Understanding middle-power thinking

Ideas for organizing middle-power cooperation can be drawn from this year's expert survey at three levels: political, thematic and institutional.

First, the **political level**. Between the latest results from 2024 and the year before, non-alignment or neutrality has become more attractive. While eight out of ten respondents in Brazil and South Africa still prefer the option of non-alignment to siding with either China or the United States, it is also increasingly becoming an alternative for 52 per cent of Indian respondents (up from 38 per cent). Even in Germany non-alignment is seen as an option by a growing number of respondents (29 per cent, up from 19 per cent). Furthermore, there is an increasingly positive (or less negative) perception of China's global influence in Brazil, India and South Africa. As non-alignment –

one of the ten Bandung Principles – gains traction, emerging middle powers will have to update what it means today when all countries are engaged in various, complex and overlapping strategic partnerships. They must seize this opportunity and discuss whether they want to foster a dialogue, including with those countries – for example, in Europe – traditionally aligned with great powers, to reshape multilateral institutions.

Second, the **thematic level**. Trade is cited as one of the top three foreign policy priorities by respondents in Brazil, India and South Africa, as well as by German experts. Except for those in India, respondents say that their country will suffer from a trade war between China and the United States. And the trade practices of both great powers are seen as unfair by a majority of respondents in all four countries. What is more, 80 per cent in Brazil, 60 per cent in South Africa and 56 per cent in India also see the EU's trade practices as unfair. As pressure on the EU increases due to the economic policies of the Trump administration, improving its image as a less difficult and more reliable trading partner for emerging middle powers could be an easy win. At the same time, it is crucial that countries like Germany join forces with emerging middle powers and strengthen the international trading system, in which great powers such as the United States are now seeking reciprocity by imposing tariffs. At the same time, it is also important for middle powers to recognize that there are issues on which their cooperation will be difficult.

For example, when it comes to the war in Ukraine, respondents from Brazil, India and South Africa simply do not see it as a foreign policy priority for their country. While this is a bitter pill for European countries to swallow, it confirms that they must do more of the heavy lifting themselves and cannot expect much support.

Third, the **institutional level**. Respondents from all four countries express little hope for international reform. Whether asked about the International Monetary Fund, the World Bank, the United Nations or the World Trade Organization (WTO), six out of ten say it is unlikely that there will be substantial reform in the next five years to make them fairer and more equitable. They are almost as gloomy when it comes to the relationship between high-income countries and low- and middle-income countries, with most respondents expecting it to deteriorate over the next five years. On the bright side, there are actions that middle powers, like Brazil, India, Germany and South Africa can take to improve this outlook and strengthen middle-power cooperation:

Institutionalizing middle-power cooperation

- **Revive the Bandung spirit:** Use the 70th anniversary of the Asian-African Conference to update the Bandung Principles to address modern challenges like reformed multilateralism, equitable development, technological parity, energy security, environmental degradation and digital governance.
- **Strengthen regional organisations:** Maximize engagement with platforms like ASEAN, the AU, the EU, the GCC and Mercosur to coordinate middle-power strategies as a counterweight to great-power dominance and competition.
- **Create a middle power forum:** Establish an informal platform for emerging middle powers to strategize on trade, security and diplomacy without aligning with great powers.

Defining non-alignment in a multipolar world

- **Update non-alignment strategies:** Redefine non-alignment to fit today's world of multi-alignment and strategic partnerships.
- **Adapt to a multipolar world:** As the Trump administration turns its back on Europe, policy makers in Brussels and Berlin can learn from the experience of countries in the Global South – from the historic momentum in the 1950s and 1960s until today – to adapt to a multipolar world.

Reinforcing development cooperation and trade diplomacy

- **Treat development spending as a strategic investment in a post-transatlantic era:** Germany must clearly articulate its national interests in development cooperation, as these are often less evident to partners than those of China or the United States. Germany should build stronger ties with emerging middle powers based on these interests, not only by emphasizing a values-based approach. Similarly, emerging middle powers may step up to promote economic cooperation and spearhead a broader effort to define and differentiate international responsibilities, particularly with regard to global challenges such as financing climate change.
- **Promote South-South and North-South trade expansion:** De-risk existing trade dependencies by strengthening ties with other middle powers in the Global South and North. Examples include a rapid ratification of the EU-Mercosur partnership agreement and completion of the India-EU free trade agreement, both of which have been in the making for two decades now. Explore the possibilities for other inter-regional agreements and reassess the primary position given to labour and environmental standards when concluding new agreements, especially with emerging middle powers.

Working on a positive narrative to advance international reform

- **Support multilateral institutions and international law by defending the United Nations Charter:** Use the 80th anniversary of the United Nations to uphold its charter's role in promoting peaceful resolution of international disputes and maintaining the principle of sovereign equality among all member states.
- **Reform and strengthen multilateral agendas:** Use multiple configurations and arrangements to advance multilateral agendas (including the 2030 Agenda), working around existing dysfunctional and ineffective institutions and regimes, as is already happening in the case of the WTO. [↗](#)

Partner of the KEMP Initiatives: Carlos Frederico Coelho and Paulo Esteves, BRICS Policy Center; Julia Ganter, Körber-Stiftung; Steven Gruzd, SAIIA; Manjeet Kripalani, Gateway House India.

Emerging Middle Powers Survey

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

Europe's priorities are not the world's

What do you think are the top three foreign policy priorities for your country?

Brazil



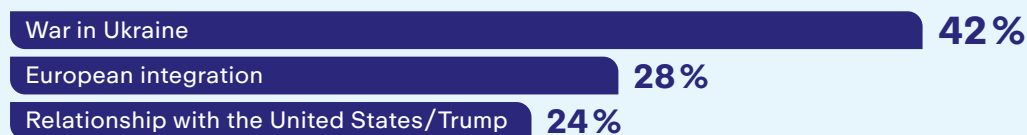
India



South Africa



Germany



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

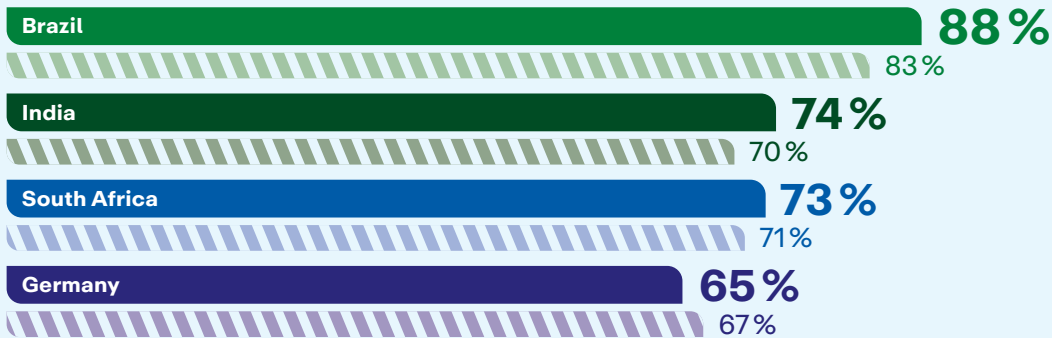


Compare with
results from 2023

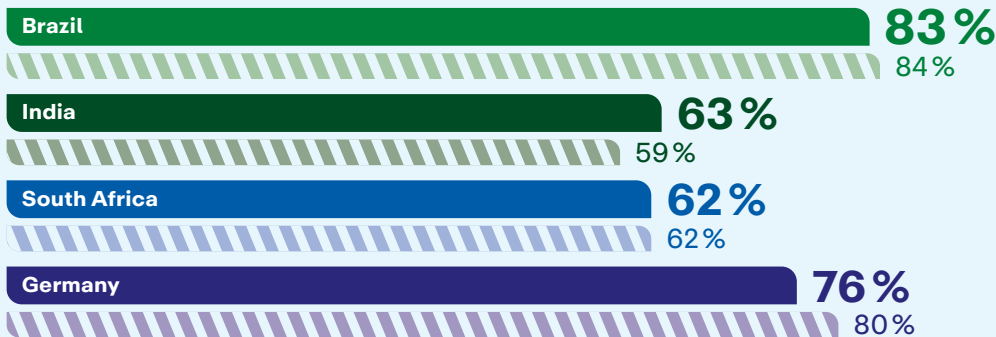
Architects of Foreign Policy

Who shapes the foreign policy of your country the most?

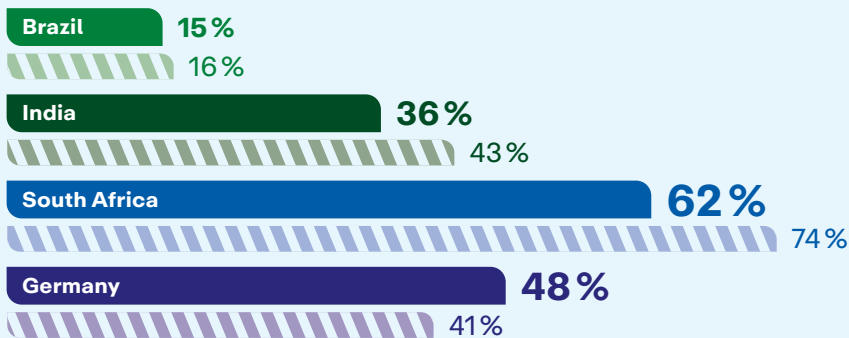
Ministry of Foreign Affairs



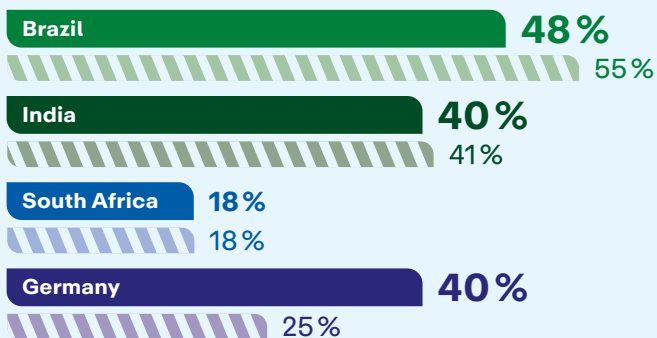
Head of government





Ruling political parties



Business sector

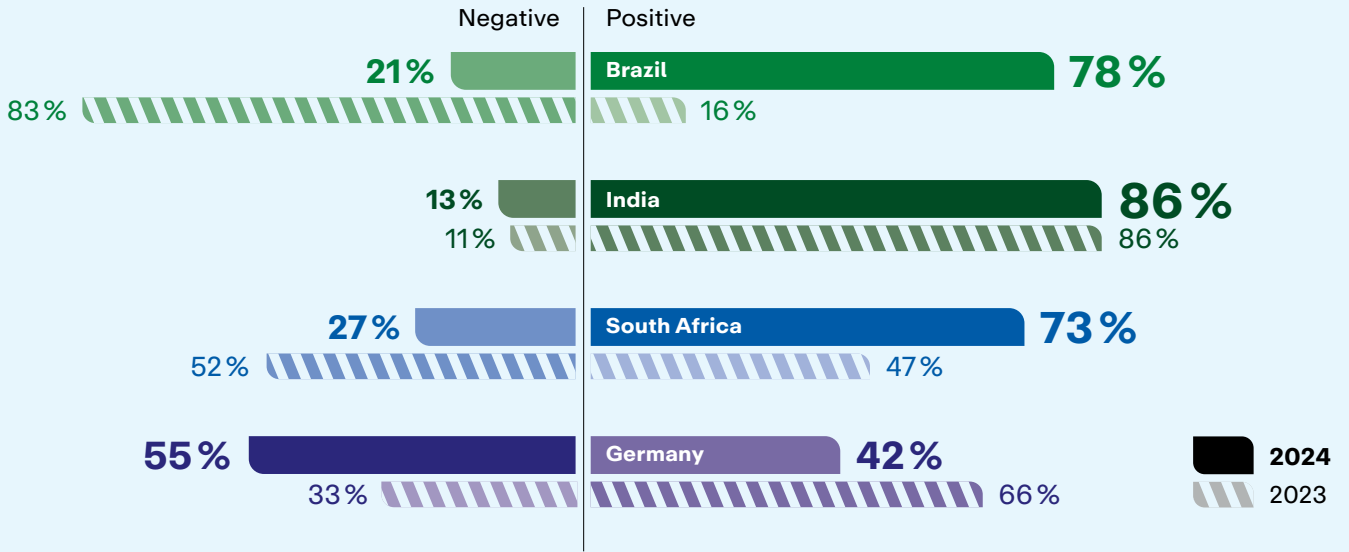


 2024
 2023

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

Confident IBSA

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

Great powers matter?

How important are your bilateral relations with ... ?

extremely important



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

Germany's to-do list

What three priorities should Germany focus on to improve relations with low- and middle-income countries?

Increase economic and development cooperation



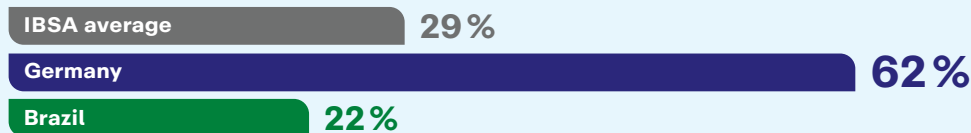
Enable technology transfers



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



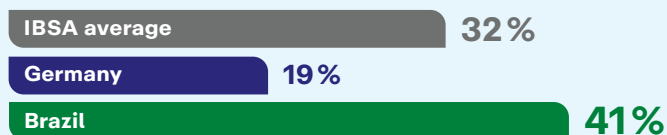
Offer trade concessions



Take the lead in reforming multilateral institutions



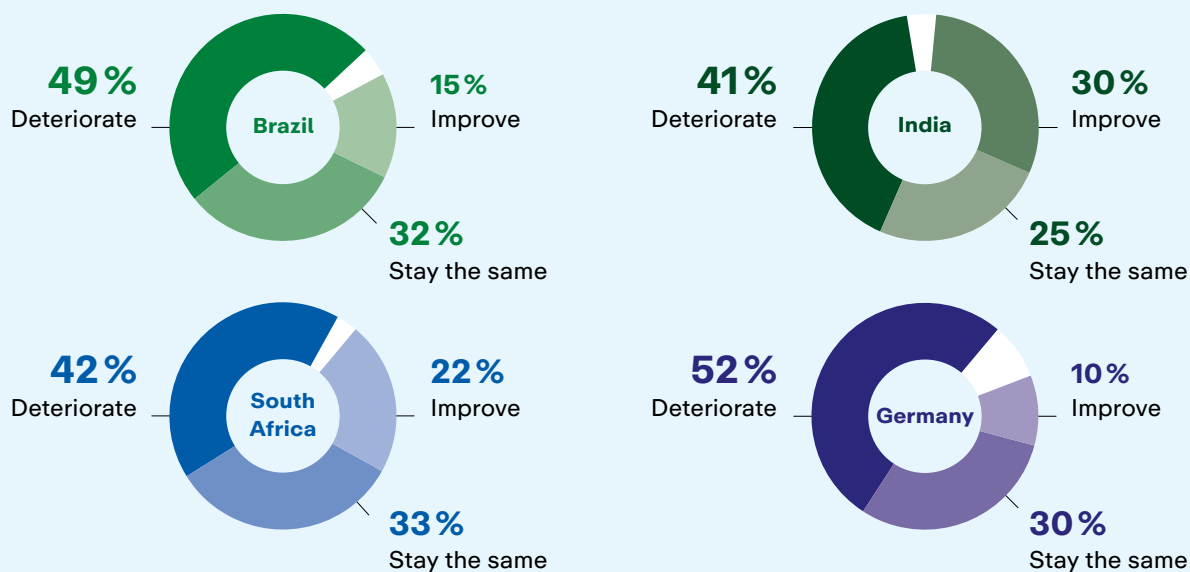
Support open research and development



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

North-South cooperation

How will high- and low-/middle-income country relations evolve in the next five years?
Will they ... ?



answer 'don't know' and 'no answer' ranged from 3 to 8 per cent for all issues

Not just one mediator

Choose three actors who have done the most to facilitate Ukraine-Russia peace talks.

	Respondents from			
	Brazil	India	South Africa	Germany
Turkey	34%	36%	48%	49%
European countries	32%	27%	29%	55%
China	48%	31%	40%	13%
India	14%	62%	11%	11%
Brazil	54%	12%	17%	13%
African countries	11%	16%	50%	9%
United States	13%	16%	16%	34%
Ukraine	7%	3%	7%	25%
Russia	2%	8%	5%	0%

All answers in per cent. Answer 'don't know' and 'no answer' ranged from 5 to 8 per cent for all issues

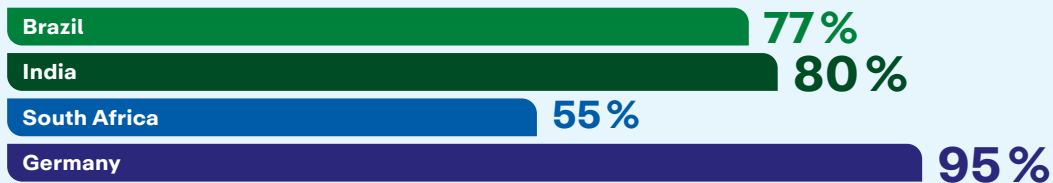
Unexpected common ground

Regarding the war in the Middle East, do you agree with these statements?

My country should play a decisive role in peace negotiations.



Hamas is a terrorist group.



Israel must be held accountable for violating international law.



Israel has the right to defend itself.



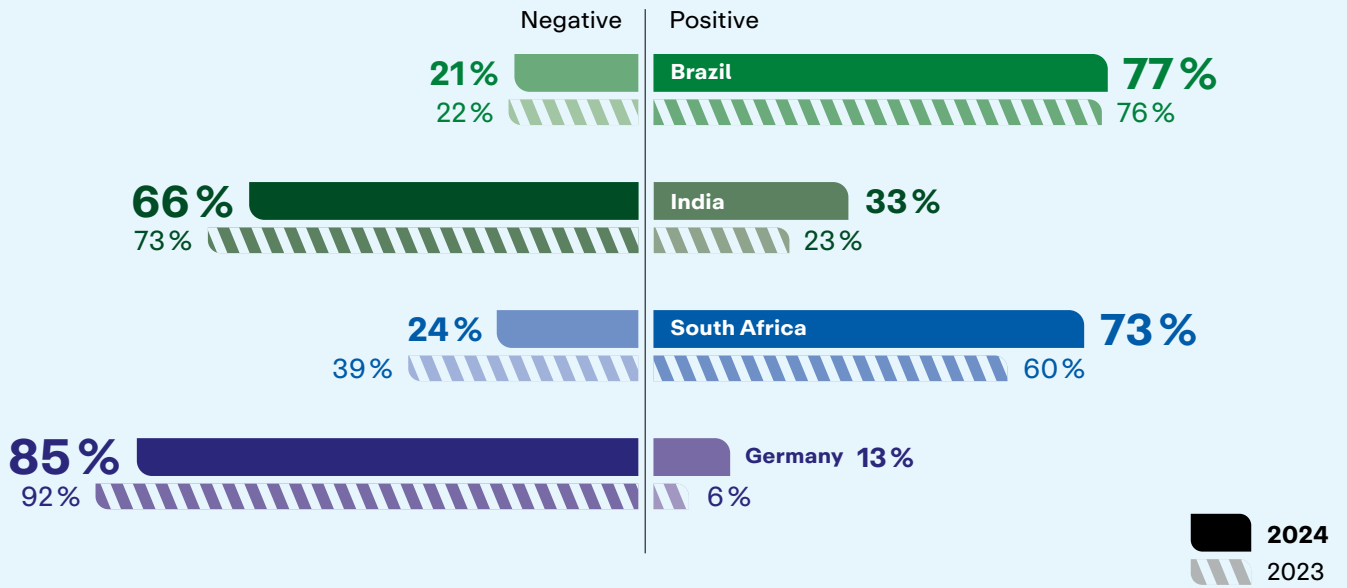
The West has lost credibility as a defender of global norms.



answer 'don't know' and 'no answer' ranged from 1 to 11 per cent for all issues

Less China scepticism

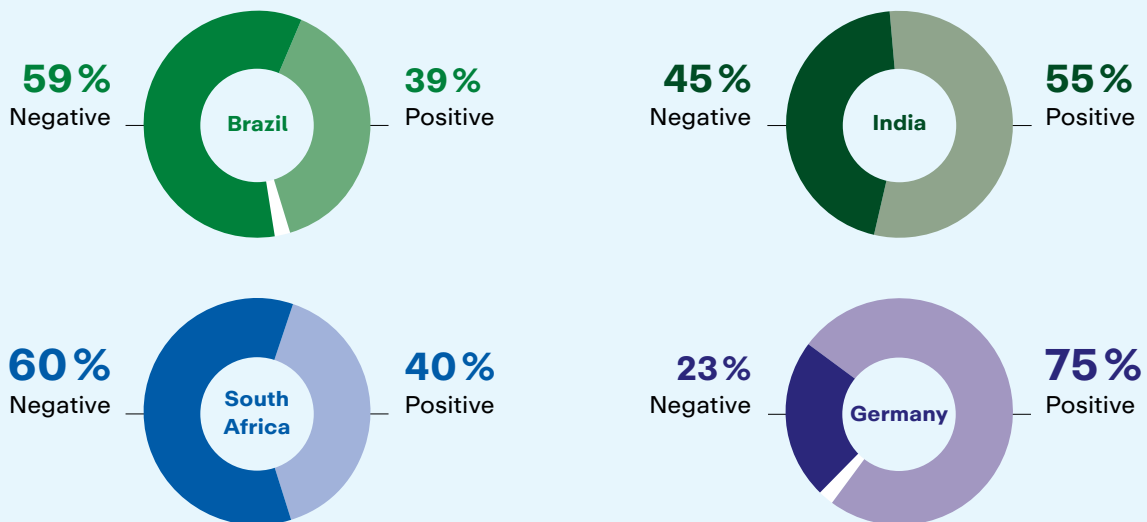
How do you evaluate China's influence globally?



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

Declining US credibility

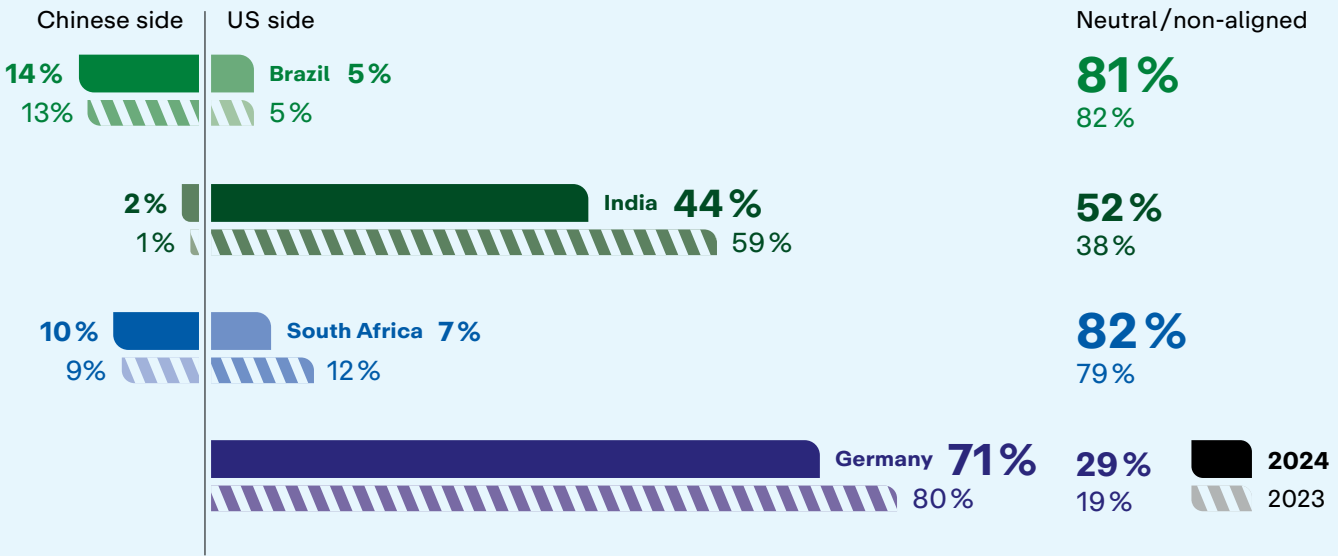
How do you evaluate the influence of the United States globally?



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

Pivot to non-alignment?

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



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

Good neighbours matter!

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

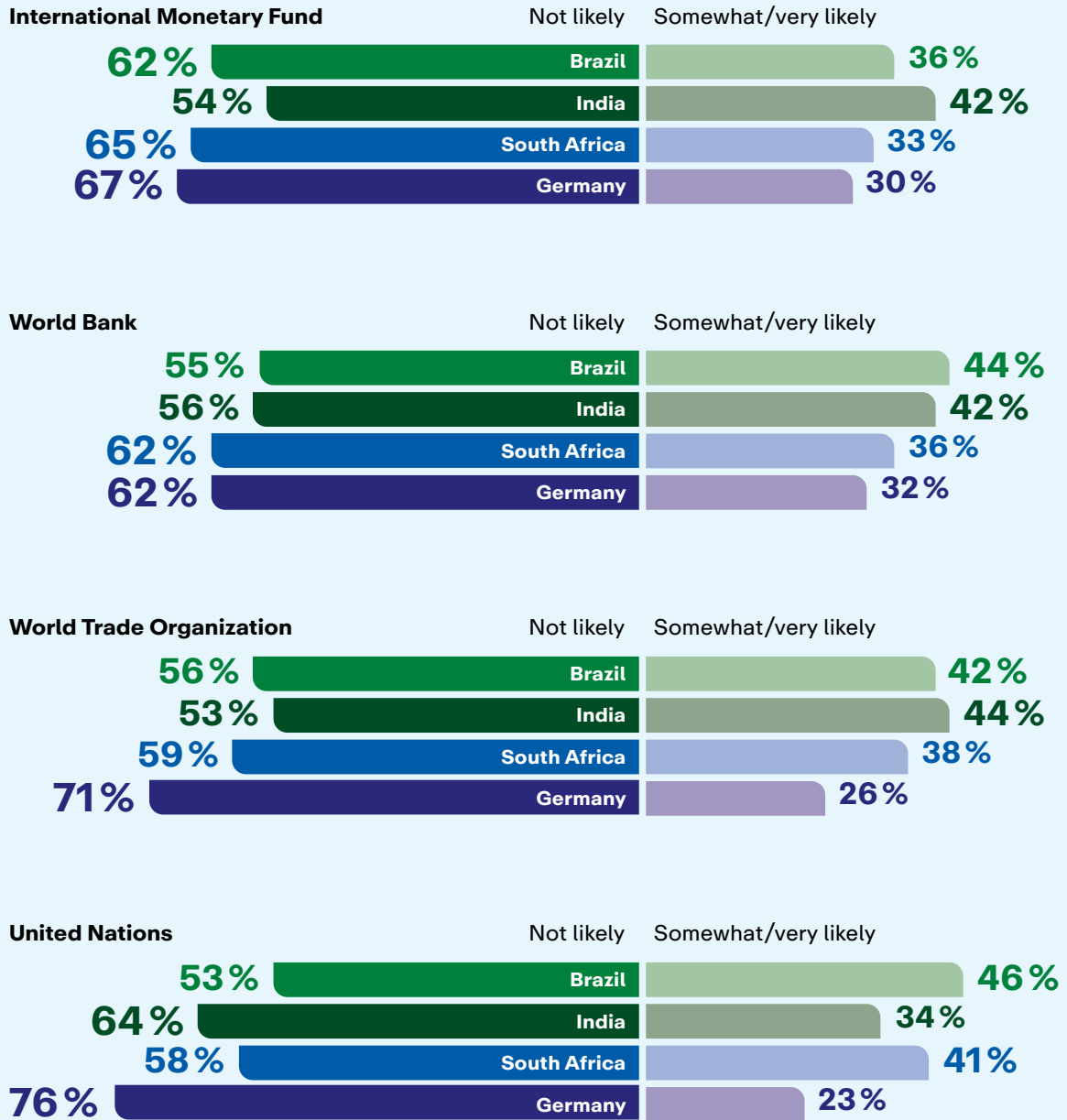
extremely important



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

Reform pessimism

How likely are major reforms to make these institutions fairer in five years?



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

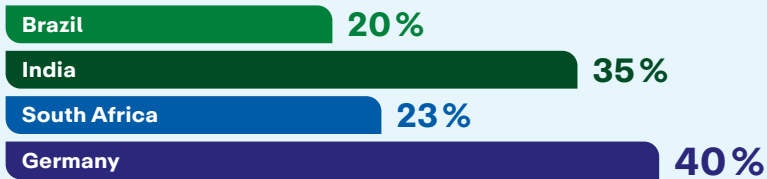
Divided on BRICS

What is your main expectation of BRICS?

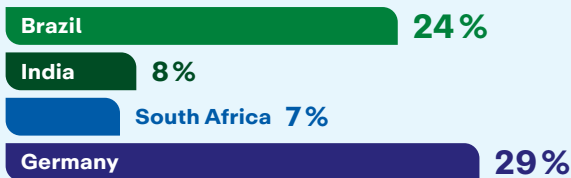
Promoting economic cooperation and growth



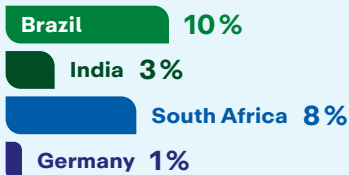
Balancing Western countries' influence



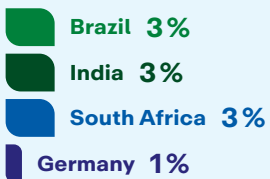
Enhancing political influence



Increasing technological and scientific exchange



Strengthening sustainable development and environmental protection



Enhancing security and defense cooperation

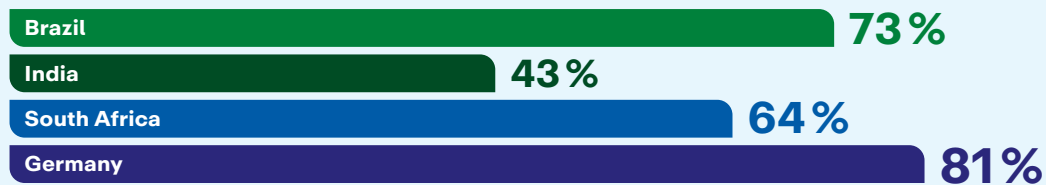


answer 'don't know' and 'no answer' ranged from 0 to 7 per cent for all issues

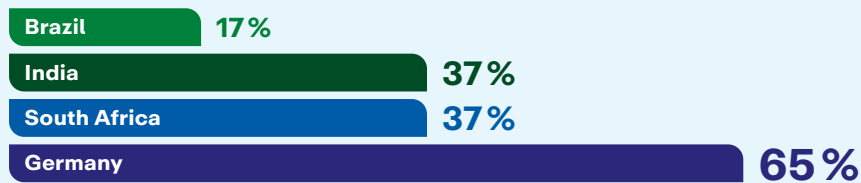
Protectionism beats fair trade?

Regarding international trade, do you agree with these statements?

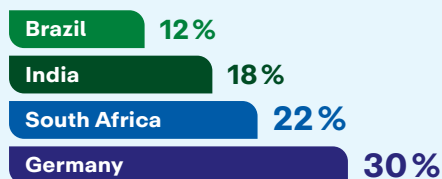
My country suffers from Chinese-US trade war.



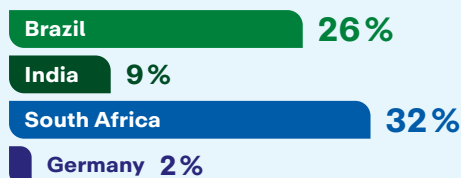
European Union's practices are fair.



Unites States' practices are fair.



China's practices are fair.



Sanctions should be used as a tool to change a country's behavior.



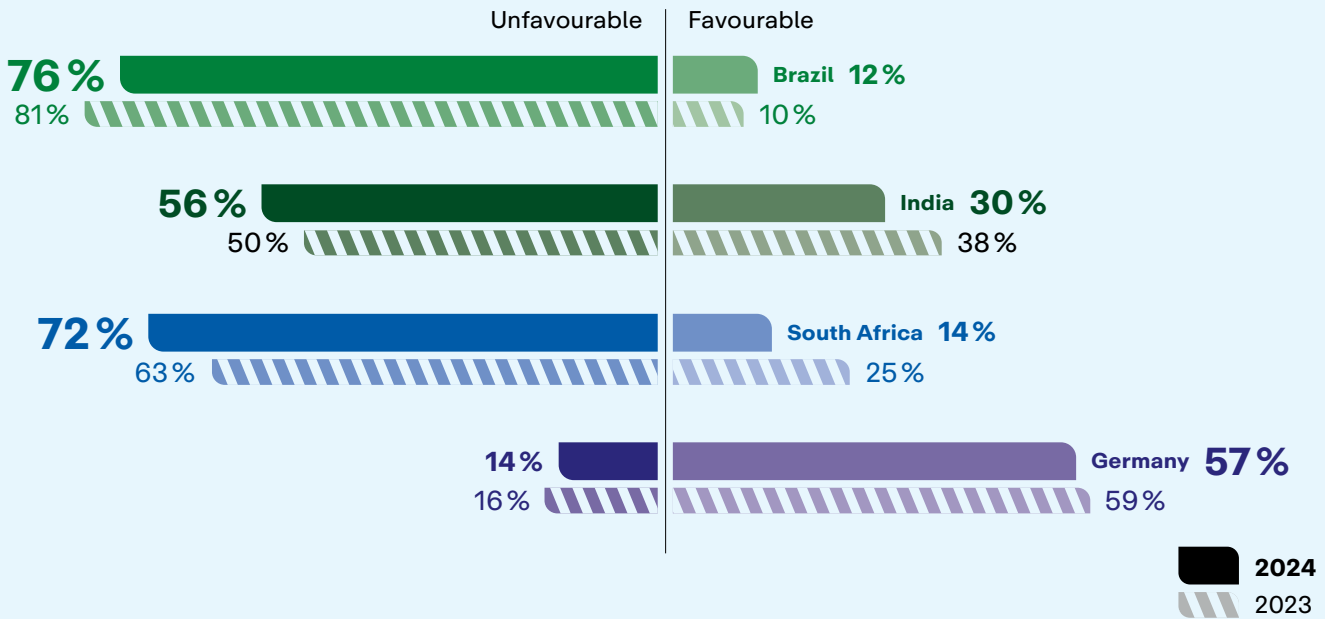
Protectionist measures should be accepted if used to protect the environment.



answer 'don't know' and 'no answer' ranged from 1 to 8 per cent for all issues

Unpopular US dollar

How would you describe the dominance of the US dollar for your country?

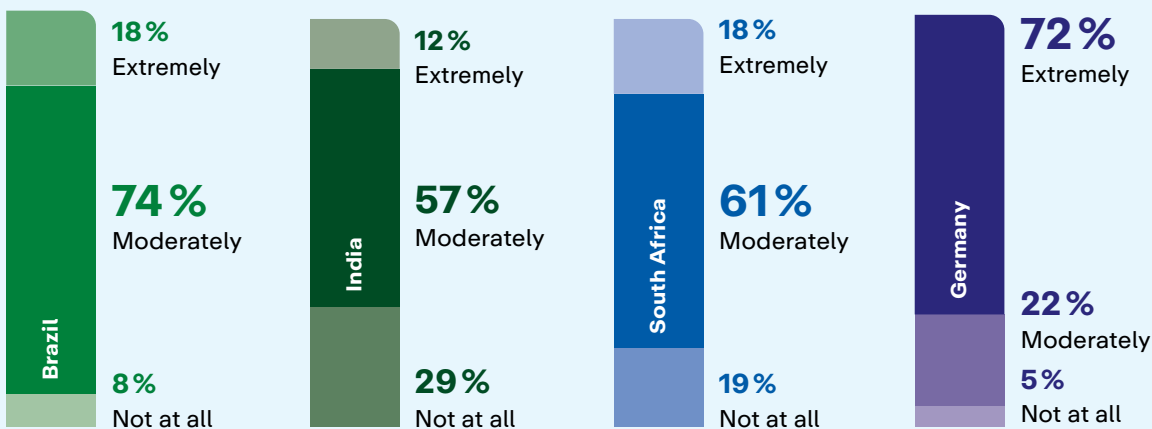


Answer 'no impact' ranged from 4 to 12 per cent for all issues.

Answer 'don't know' and 'no answer' ranged from 6 to 17 per cent for all issues

Trump no game-changer

To what extent does who is president of the United States influence politics in your country?



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

United on the environment

Regarding the environment and climate, do you agree with the following statements?

Human activity causes global warming.



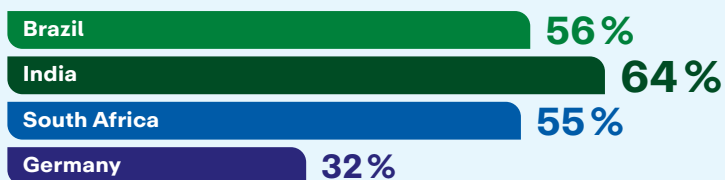
My country's energy transition needs global financial support.



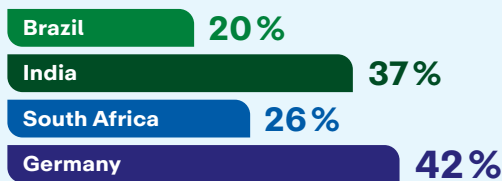
My country will shift to cleaner energy in the next five years.



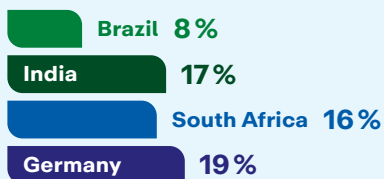
Environmental protection conflicts with economic growth.



My country is spending enough to protect the environment.



International institutions are doing enough to protect the environment.



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

Renewables over fossil fuels

Choose three priorities for your country's energy needs.

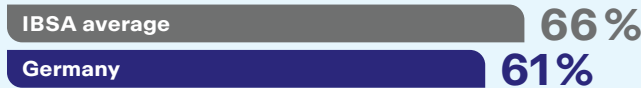
Increase the production of renewable energy



Import more energy from other countries



Supporting eco-conscious lifestyles



Increase fossil fuel production



Regulation of consumption



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

	Brazil	India	South Africa	Germany	
Base unweighted (number of participants)	298	208	183	217	
Think tank/Academia	42	33	41	38	%
Government	19	8	11	12	%
Private sector	10	27	3	6	%
Other	28	28	43	43	%
Base unweighted (number of participants)	298	208	183	217	
Foreign policy	27	20	32	37	%
Economy and foreign trade	19	13	9	14	%
Defence and international security	12	9	7	17	%
Education and Research	8	11	12	6	%
Other	33	42	38	25	%

The survey was commissioned by the Körber-Stiftung and conducted by Verian Germany between 15 October and 2 December 2024. The interviews were conducted online. The sample is neither representative nor random. The 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 the 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 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.



Scan the QR code to access the data.

Bandung at 70

On the occasion of the 70th anniversary of the first Asian-African Conference in Bandung in 1955, Körber-Stiftung is focusing on its relevance for today's global challenges as well as its historical influence on principles such as sovereignty and non-alignment.

Stay tuned for activities and publications that explore the strategic thinking of middle powers in the Global South and Global North bringing historical context to the debate on our current world order and international cooperation.



Egyptian Member of Parliament Sahar Albazar, founder of the Foreign Policy Community of Indonesia Dino Patti and UN Development Programme Administrator Achim Steiner in discussion during Bandung at 70: Rethinking Neutrality, Sovereignty, and the Role of the UN in Times of Great-Power Politics at the Munich Security Conference 2025, organized by Körber-Stiftung in cooperation with UNA Germany.



Scan the QR code for more information.

Beyond a Zero-Sum Game

The Global North must be a better partner.

The last few months have been a wake-up call for Germany and the EU, and they have proven that we are in the middle of a race in geo-technology and geoeconomics. On the one side is China, which aggressively pursues a course of tying resource-rich developing countries to the Chinese value chain via the Belt and Road Initiative or BRICS+. It weaponizes its engagement and framing development assistance as inherently anti-Western. On the other side is the new US administration, which is pursuing even harsher, America First, policies with tariff-driven trade threats that will harm global growth.

‘Development cooperation should be linked to foreign policy promotion and national and European interests.’

As global tensions rise and established trade patterns shift, the Global South is emerging as an increasingly crucial partner for Europe. Intensifying cooperation with these countries is therefore central to the international agenda of the Federation of German Industries (BDI). Germany has relied on an export-oriented model and a tariff-free era combined with a rules-based international order that strengthened a multilateral system. Over the last few years, however, other countries have changed their patterns of cooperation, following mainly national interests and implementing protectionist measures. International rules and institutions have been weakened and multilateral agreements like the Paris Climate Agreement risk failure.

At the beginning of 2024, the BDI called for an *Entwicklungspolitische Zeitenwende* (a turning point in development policy). Development cooperation should be tied to foreign trade promotion and linked to national and European interests. Financial instruments should be less bureaucratic and aligned with objectives that combine German technological expertise with local expertise. Demonstrating that Germany has a better offer than



Wolfgang Niedermark is a member of the Executive Board of the Federation of German Industries (BDI).

some competitors and creating an industrial base in partner countries will generate a win-win situation for everyone. Furthermore, European companies should have better access to official development assistance programmes in procurement procedures. Yet, due to an enormous administrative burden, we put spokes in our own wheel.

Sustainable value chains, digitalization, infrastructure, workforce development, labour mobility and building efficient healthcare systems worldwide – these are all examples of engagement that will bear fruit in the long run and demonstrate successful North-South cooperation. Development cooperation must be technology-neutral, supporting a broad range of technologies rather than promoting specific ones exclusively. It must be aligned with local needs. Specifically, the EU Global Gateway’s infrastructure projects must be expanded and swiftly implemented. On a substantive level, the EU must focus on expanding its free trade agreements. The BDI welcomes the European Commission’s strong emphasis on trade policy, which will promote strategic diversification. Another prime example is building raw-material partnerships, which will create a win-win scenario for both sides.

In the end, Germany and the EU will not succeed in addressing climate change on their own. We all depend on each other. While criticism of industrialized countries for their historical role in

Germany's to-do list

What three priorities should Germany focus on to improve relations with low- and middle-income countries?

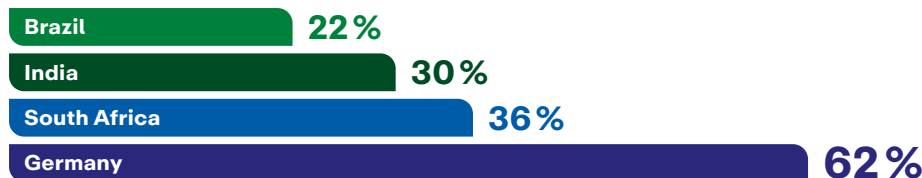
Increase economic and development cooperation



Enable technology transfers



Offer trade concessions



climate change is valid, there is no time for blame games. German and EU policies must acknowledge that there is no single path to climate neutrality and must avoid dictating how others achieve their goals. Instead, they should focus on technology partnerships, sharing knowledge and supporting region-specific green industrial strategies that create sustainable jobs and growth.

‘Global South heterogeneity makes a one-size-fits-all approach neither feasible nor appropriate.’

The countries of the Global South have experienced remarkable economic growth in the past 20 years and continue to do so. The EU needs them more than they need it. The heterogeneity of the Global South makes a one-size-fits-all approach neither feasible nor appropriate. Germany must engage with each country as an equal partner. It should not only promote the idea of reforming the United Nations Security Council in its favour but also support the African Union and India in obtaining a seat. International institutions and alliances should adapt to today's realities. The Global North must be a better partner by offering the Global

South more compelling alternatives than before and better ones than those from countries that see only a zero-sum game.

Political leaders must increase their presence through economic diplomacy, visits and summits, ensuring that engagement is more than just rhetoric. Germany and the EU need a compelling narrative for the rules-based order. While European principles remain unchanged, we must communicate them in a way that resonates globally. Instead of framing discussions solely around universal human rights, democracy and free trade, emphasizing transparency and fairness can foster trust and mutual benefit in regions with different political standpoints.

German industry wants to engage with the Global South as part of a united EU. As one large single market and voice, the EU will have a more effective approach toward the Global South. We must all be on equal footing, addressing current and future challenges together. For German industry, the message is clear: In a world of renewed national interests, the EU and its member states must recognize the urgent necessity of expanding cooperation and present themselves as reliable and robust competitors. ↗

‘Global Action Is Non-Negotiable’

With the BRICS summit and COP30 taking place in Brazil this year, COP Executive Director Ana Toni wants to accelerate progress on climate.

Körber-Stiftung: As COP30’s executive director, how do you remain optimistic amid slow emission cuts, the United States exiting the Paris Agreement again and ongoing challenges in financing climate action?

Ana Toni: Climate progress keeps me optimistic. Ten years ago, the Paris Agreement projected 4.5 to 5 degrees warming by 2100. Now, the Paris Agreement Rulebook puts us on track for 2.7 degrees – better, though short of the 1.5 degree goal. COP28 and the Global Stocktake set key targets to achieve real-world progress: triple renewable energy, double energy efficiency, phase out fossil fuels, and end deforestation. Brazil’s role is to accelerate this collective effort – *mutirão* in Portuguese – with practical steps like carbon markets and adaptation indicators. The climate urgency we face will be our guiding force. COP30 will focus on converting pledges into action and fostering cultural shifts across businesses, governments and society.

In our survey, Brazilian respondents ranked climate change as a higher foreign policy priority than those from India, South Africa and Germany. How will Brazil push global climate urgency, especially as only 13 of 195 countries have met the Paris Agreement deadline to update their climate action plans, Nationally Determined Contribution (NDC)?

The climate crisis is already in our daily lives, from wildfires in California to floods in Brazil. People are losing their homes, businesses and lives. Climate inaction accelerates inequality and poverty. COP30 will emphasize that real solutions come from local action within governments, cities and businesses. Germany’s failure to update its NDC, for instance, is a national lapse, not a COP shortfall.

What impact will the United States’ withdrawal from the Paris Agreement have on COP30?

The United States, historically the biggest and now the second-biggest polluter, remains pivotal. While



Ana Toni
is secretary for climate change in the Ministry of Environment and Climate Change of Brazil.

its withdrawal will have negative impacts, we have seen state governments, which have 60 per cent of the climate agenda in their hand, and companies continuing their climate efforts before. We expect the same now. The United States will still be a legal COP30 participant, and we will monitor its role closely, but we do not know if it will send a delegation or obstruct negotiations. However, the withdrawal is already having serious consequences, with many companies scaling back their climate commitments under US influence. This retreat weakens global efforts to address the urgency of the climate crisis by downplaying its severity. In response, the international community must strengthen multilateral cooperation, with emerging powers like Brazil, India, China and South Africa as well as the EU leading the charge and reaffirming that global action is urgent and non-negotiable.

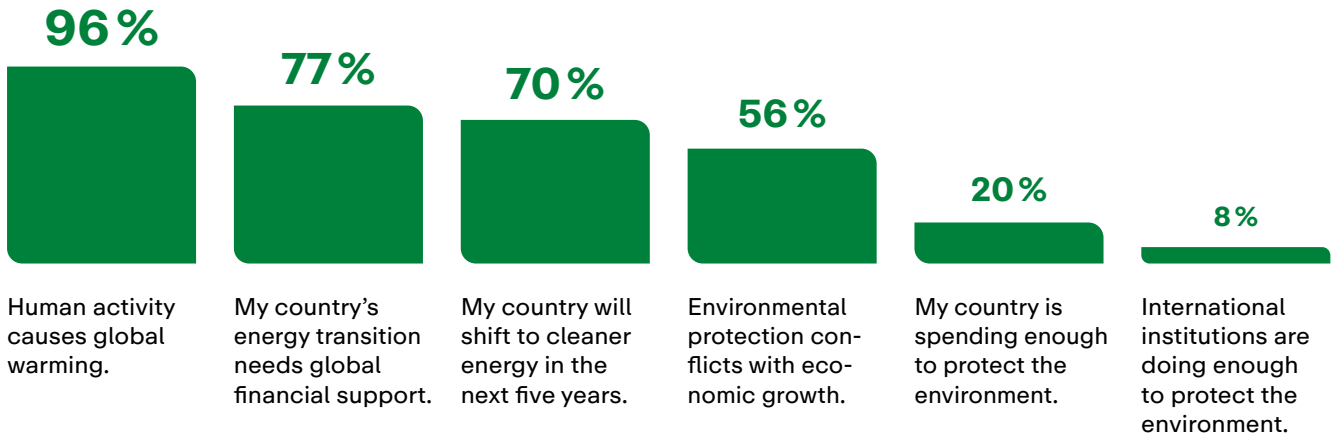
What role will China, which is responsible for over 30 per cent of global emissions, play?

China is making progress, guided by its ‘ecological civilization’ concept. Over the past decade, it has led in renewable energy and ecosystem restoration, though emissions remain high. We hope their next NDC for 2035 will confirm when emissions will peak. China also supports global decarbonization by exporting low-carbon technologies like solar panels, wind turbines and electric vehicles to Africa

United for the environment

Brazilian respondents:

Regarding the environment and climate, do you agree with the following statements?



and Latin America. China's export of low-carbon technologies aids global decarbonization, positioning it as a reliable partner compared to more unpredictable players like the United States.

How crucial are emerging middle powers like Brazil, India, Mexico, and South Africa in shaping the climate agenda and COP30?

They are key, advocating for low-emission growth amid high investment costs. COP30 aims to normalize climate negotiations and integrate practical solutions, bridging developed countries' mitigation focus with developing countries' financial needs. Healthy economic competition is fine, but cooperation is more essential to tackle climate change. The Paris Agreement Rulebook and COP30 must drive action toward the 1.5 degree target.

Given concerns about the global retreat from development aid and climate finance, including the cuts by USAID, what is the status of the \$1.3 trillion climate finance roadmap agreed upon COP29 for 2035?

We are already considering the roadmap and listening to negotiators to understand their expectations. COP30 will be the starting point for this discussion, though it will not end there. The challenge is coordinating existing initiatives, from sovereign wealth funds to International Monetary Fund reforms, so they complement each other, not compete. Mobilizing climate funding must go beyond public money. The \$1.3 trillion climate finance roadmap should streamline these initiatives, making the conversation more coherent and

action-oriented. Currently, 90 per cent of climate investments flow to Europe, the United States and China. Investing in clean energy in Brazil or India benefits the entire planet. Yet, donor countries often treat it as aid rather than self-interest. We need to redirect more funds and resources to emerging economies. Climate security is a shared responsibility: if these countries cannot fund solar, they will turn to coal.

Our survey found that Brazilian respondents are more likely than respondents from other countries to see climate as a priority, but also to think that their country is not spending enough on climate protection. Do you agree? Definitely. Resources are limited, but awareness is growing. COP30 will showcase this societal engagement and help attract new investments through initiatives like the Ecological Transformation Plan, Ecoinvest and the Climate Fund.

What should Brazil achieve in climate finance during its BRICS presidency?

The BRICS summit should build on Brazil's G20 success, where climate and finance leaders collaborated for the first time. Expanding this within BRICS can bring momentum to COP30. Addressing climate finance requires cross-sector efforts, going beyond environment ministers alone. If BRICS commits, it will drive action at COP30. ↩

The interview was conducted by Paulo Esteves and Julia Ganter in February 2025.

The Emerging Exception

India sees itself as transcending middle power.

According to Encyclopaedia Britannica, a middle power can be defined as ‘a state that holds a position in the international power spectrum that is in the middle – below that of a superpower which wields vastly superior influence over all other states, or of a great power, but with significant ability to shape international events.’ Brazil, Germany and South Africa fit this definition well. But, today, India’s geostrategic positioning, economic trajectory and global role set it apart.

‘The traditional label of middle power fails to capture India’s growing status.’

As the world’s most populous country and the fifth-largest economy (rapidly advancing towards becoming the third-largest), India is a unique case. It is the largest democracy, a major technological force and an active global player with diversified interests across all continents. The traditional label of middle power fails to capture India’s growing status. It may be, as External Affairs Minister Subrahmanyam Jaishankar has said, ‘a leading power’ or, as many in the country see it, ‘an emerging great power’ guided by its expansive worldview.

India has successfully adopted a balanced approach towards the great powers, its neighbours in South Asia, players in the extended neighbourhood, and other Global South countries. The effectiveness of its foreign policy machine in recent years is mainly due to the government’s success in developing an integrated and well-coordinated approach and the deep personal interest Prime Minister Narendra Modi has taken in this domain. The second *Körber Emerging Middle Powers* survey reveals that India has one fundamental thing in common with Brazil, Germany, and South Africa: each country’s respondents rate their foreign ministry as looming large over various stakeholders in the formulation of foreign policy.



Rajiv Bhatia is a distinguished fellow at Gateway House, a former ambassador of India to several states and the author of three books on Indian foreign policy.

Public diplomacy has begun to prosper over the past 15 years. Indian think tanks supported this with their proactive role in shaping, influencing and articulating foreign policy. The extension of events and inclusion of people from around the country during India’s G20 Presidency in 2023 was an important factor in enhancing the popularity of its foreign policy.

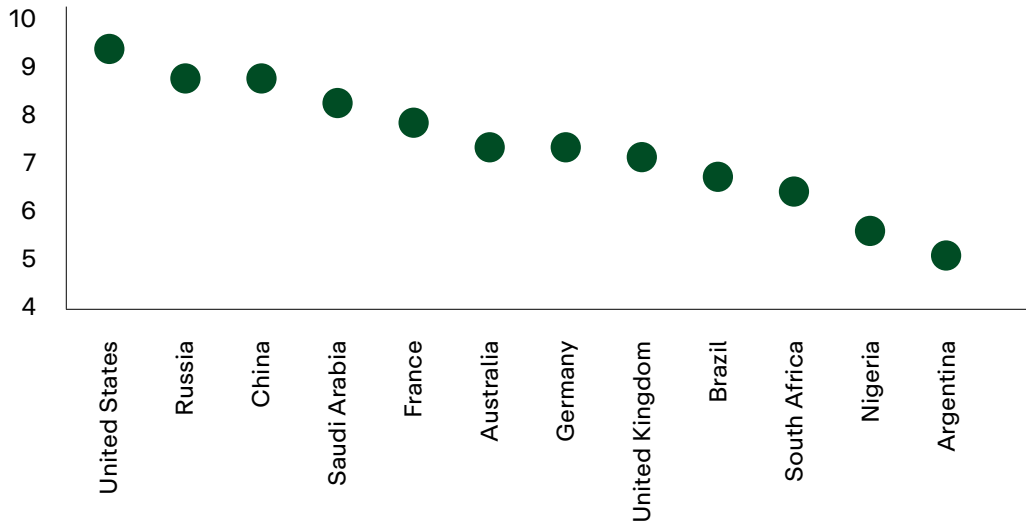
In the geopolitical triangulation with China and the United States, India attaches much higher importance to the latter. This trend gained further momentum after the Galwan clash between Chinese and Indian troops in the Himalayas in 2020. After 30 sessions of border talks over four years, in October 2024 at the BRICS meeting in Kazan, Russia, the two countries began a restricted thaw in their relations. But, despite this diplomatic opening, India does not expect a fundamental shift in China’s approach. It continues to view its neighbour with caution, mindful of past conflicts and of Beijing’s strategic ambitions. India prioritizes diplomacy over confrontation and does not respond to provocations with military escalation. The outlook for relations with China remains one of strategic vigilance, in which India balances engagement with it while strengthening ties with the United States and other allies to safeguard its national interests.

Great powers matter?

Indian respondents:

How important are your bilateral relations with ... ?

extremely important



New Delhi and Washington, even under the new Trump administration, are set to find new economic and strategic drivers and motivations – such as energy, defence, and bilateral investments – to be mutually dependable partners, especially due to the common threat posed by China in the Indo-Pacific region. With regard to this threat, Modi has taken the art of summit diplomacy to a new level, as demonstrated by his successful visits to France and the United States in February 2025. Europe will retain its importance to India, with France and Germany the countries of most interest. However, Washington is certain to remain Delhi's top partner in the foreseeable future.

‘The outlook for relations with China remains one of strategic vigilance.’

India's global engagement is not limited to bilateral relations. It is an active participant in multiple international groupings, with each serving a different strategic purpose. Among plurilateral groupings, the Quad (because of China) and BRICS (to strengthen India's strategic autonomy) are of utmost significance to India. It joined Brazil, China, and South Africa to form the BASIC group in 2009 to work towards common climate goals. In the G4, India campaigns alongside Brazil, Germany, and Japan to push their candidatures to become perma-

nent members of an eventual expanded UN Security Council. Pre-dating BRICS, IBSA has been an excellent platform for South-South cooperation between Brazil, India, and South Africa.

‘Washington is certain to remain Delhi's top partner in the foreseeable future.’

India remains optimistic and confident about its global positioning, driven by the resilience of its economy, its technological process, and its expanding diplomatic footprint. Its ability to shape international discourse is no longer in question. This is why India has moved beyond seeing itself as merely an emerging middle power, but as a key player shaping the global order. ↗

Bridging the North-South Divide?

South Africa's G20 presidency seeks to be a catalyst for consensus, to strengthen multilateralism, and to champion Africa's agenda.

At the Rio Leaders' Summit in late November 2024, Brazil's President Luiz Inácio Lula da Silva passed the baton of the G20 presidency to South Africa's President Matamela Cyril Ramaphosa. This marks the first time that an African country would lead the G20 since the summit was elevated to a heads of state and government meeting in 2008.

South Africa's presidency is the last of a four-year sequence in which developing countries have led the G20, following the presidencies of Indonesia (2022), India (2023) and Brazil (2024). When one looks further back, seven of the last ten G20 presidencies were held by emerging markets.

‘South Africa seeks to harness global will and capabilities to confront the enormous challenges the world is facing.’

This historic cycle of presidencies is a reflection of the strategic role and increasing global influence that emerging markets now play. According to the International Monetary Fund, emerging market members of the G20 contributed almost two-thirds of global growth in 2023. In addition, emerging economies are converging to guard multilateralism and are leading global efforts towards a fairer, more equitable and representative international order, with the United Nations at its centre.

These countries have leveraged their membership in various global formations to amplify the voices of the developing world and to align, and at times to assert, their interests in an effort to shape global governance and global policy-making.

Under the theme ‘Solidarity, Equality, Sustainability’, South Africa seeks to harness global will and capabilities to confront the enormous challenges the world is facing. Its G20 presidency is guided by its strategic foreign policy pillars: national interest, the African agenda, South-South cooperation and multilateralism.



Zane Dangor is the director-general of the Department of International Relations and Cooperation and South Africa's G20 Sherpa.

During its tenure, South Africa aims to consolidate the gains made by the three past G20 presidencies in driving the developmental and reform agenda. These like-minded emerging economies represent four distinct geopolitical regions of the world, are vibrant democracies with significant populations, and are arguably better suited to advance efforts at consolidating the emerging multipolar world.

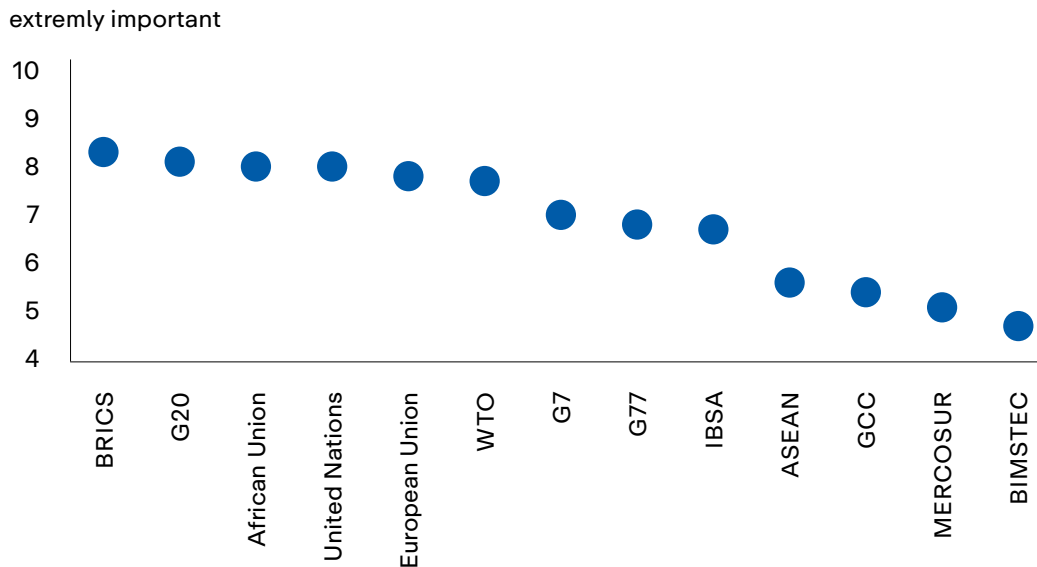
UN Trade and Development forecasts that world GDP will grow by \$55 trillion in the next five years, 70 per cent of which will come from the Global South, as will the lion's share of population growth. This further legitimizes the demands of emerging economies and the Global South to be fairly and proportionately represented in global political and economic decision-making structures such as the World Trade Organization, the International Monetary Fund, the World Bank, and the United Nations Security Council (UNSC).

The inclusion of the African Union (AU) as the 21st member of the G20 at the New Delhi Leaders' Summit in 2023 was a pivotal step towards ensuring that the forum is more representative, legitimate and inclusive. The AU's membership has amplified Africa's voice in global economic governance while ensuring that the development priorities of the continent and the Global South find expression firmly and permanently onto the agenda of the

Good neighbours matter!

South African respondents:

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



G20. As a member, the AU will play a critical role in reinforcing and complementing South Africa's assertion that it will use its G20 presidency to build on its record of embodying Africa's aspirations, notably 'Agenda 2063: The Africa We Want'.

‘Common challenges include continued fragmentation within the G20 on how to respond to common problems.’

Current confrontational approaches to multilateralism, compounded by geopolitical and geoeconomic dynamics, present challenges and opportunities for South Africa as it sits at the helm of the G20.

The challenges include continued fragmentation within the G20 on how to respond to common problems such as growing public debt, the impact of climate change, unprecedented levels of inequalities between and within countries, and large and growing gaps in financing for sustainable development. In response, South Africa has set four priorities for its G20 presidency: strengthening disaster resilience and response; ensuring debt sustainability for low-income countries; mobilizing finance for a just energy transition and harnessing critical minerals for inclusive growth and sustainable development.

In addition, three High-Level Task Forces – on inclusive economic growth, industrialisation, employment and reduced inequality; food security; artificial intelligence, data governance and innovation for sustainable development – will be established.

To address the debt issue, South Africa has also decided to establish a Cost of Capital Commission aimed at investigating the issues that impair the ability of low- and middle-income countries to access sufficient affordable and predictable flows of capital to finance their environmentally responsible and social inclusive development plans. This is critical issue for developing countries, especially those in Africa.

Within only five years to go to fulfil the 2030 Agenda for Sustainable Development, South Africa has a mammoth task to steer consensus within the G20 to reinvigorate global action and commitment towards achieving its goals.

South Africa seeks to reinforce and add momentum to implementing what the G20 has already agreed, while also taking concrete steps towards addressing the remaining, new and emerging threats to our future.

The G20 has been referred to as the G7 plus BRICS, which makes it an ideal forum to reconcile ideological divides and policy divergences, especially between the Global North and the Global

South. South Africa will use the convening power of the G20, as the premier forum for financial and economic cooperation, to reposition it as a catalyst for global consensus on issues affecting the global community.

‘South Africa will play a bridge-building role during its G20 presidency.’

As South Africa has done in the past and in many fora, it will thus play a bridge-building role during its presidency of the G20, overcoming geopolitical tensions and chasms among members, to reach consensus on priorities and deliverables. South Africa will take a pragmatic approach to its presidency, balancing an ambitious developmental agenda against the need to achieve consensus on key issues.

The G20 represents 85 per cent of the global economy, mostly through emerging economies; more than 75 per cent of world trade and around two-thirds of the world’s population. Therefore, the role of the G20 in creating the foundation for global economic stability – a vital catalyst for economic development and implementing consequential global commitments such as the Pact for the Future, the 2030 Agenda, and indeed the continent’s blueprint, Agenda 2063: The Africa We Want – cannot be overstated.

‘G20’s role is to create the foundation for global economic stability.’

South Africa and Germany, while being avid defenders of multilateralism and its institutions, share a common understanding that lack of reform remains a potential threat to the legitimacy of these institutions. While the global-governance reform agenda has been mainly led by the Global South, influential developed countries such as Germany and Japan also remain without UNSC permanent membership. Therefore, the call for reform is not only in favour of the Global South but also of those who were less powerful in the aftermath of the Second World War.

South Africa and Germany are committed to peaceful and inclusive societies; climate, energy and the just transition; sustainable economic development, training, and employment; and health and combatting pandemics. In the context of bilateral development cooperation, Germany has committed further funding equivalent of \$281.1 million for the period from 2024 to 2026. It is thus

an important ally in achieving South Africa’s G20 high-level deliverables and priorities.

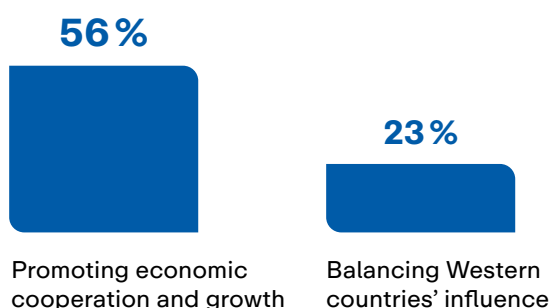
To further advance Africa’s interest within the G20, South Africa will build on the Germany’s G20 presidency’s Compact with Africa (CwA) deliverable by working with all G20 members, including Germany and the AU, to pursue a broadened and effective G20 CwA, which includes increasing the number of participating AU members.

President Ramaphosa has emphasized the importance of cooperation, collaboration and partnerships – between individuals, groups, peoples and nations – as the foundation for progress.

Divided on BRICS

South African respondents:

What is your main expectation of BRICS?



South Africa also practises this cooperative culture and approach domestically, through the establishment of the Government of National Unity following the May 2024 elections. The government has demonstrated the potential to unite the nation and foster progress, allowing for meaningful discussions on accelerating structural reforms.

South Africa’s optimistic economic prospects have ensured that it is increasingly positioned to play a leading role in shaping solutions to domestic and global challenges.

The success of South Africa’s G20 presidency will to a large extent be determined by its ability to drive consensus on issues pertinent to Africa and to developing economies in general. It will do this by leveraging bilateral relations and membership of formations such as BRICS, and promoting cooperation and collaboration between our partners in the Global South and the Global North. ↩

Strategic (Non)-Alignment?

Five comments on Emerging Middle Power diplomacy in a multipolar world order.



Christopher S. Chivvis is senior fellow and director of the American Statecraft Programme at the Carnegie Endowment for International Peace.

Emerging powers should work with President Donald Trump on shared interests, but they will need to be realistic about the risks his unpredictability creates and the shifts in the world order that may result from it. At the start of his second term, he has issued a record number of executive orders, touted far-reaching plans for peace in Europe and the Middle East, and threatened countries around the world with tariffs. He prefers to keep his domestic and foreign opponents off balance. The **United States'** future role in the world is thus increasingly unclear.

Nevertheless, many emerging powers have welcomed his administration, expecting a pragmatic and transactional approach distinct from the human rights and democracy promotion favoured by the Biden administration. Trumps' threat of major tariffs on China could also benefit emerging powers if it deflects US demand toward their markets; for example, in the manufacturing sector, which China dominates. If the United States ends up in a major standoff with China around the world,

this could even offer emerging powers the chance to exploit this competition by playing the two sides off against each other. Some countries, such as Nigeria, may also hope that the Trump administration will be far more lenient on carbon-emissions goals and more focused on energy security in ways that will benefit their economic growth.

These potential upsides come with major risks for the world's emerging powers. To begin with, there is the massive reduction in US foreign assistance, which is the flipside of the administration's plan to focus relationships with the Global South on mutually beneficial economic ties. Trump will moreover not hesitate to use very coercive trade and other measures to extract what he wants from other countries, especially the less powerful. Emerging powers that might seek to enter into a negotiation with his administration should take heed. More broadly, the unpredictable nature of the president's foreign policy could inadvertently damage the global institutions that provide a stable international environment on which emerging powers rely for economic growth and security. A global economic crisis, not to mention a war, would hit many of the world's emerging powers very hard. Constructive engagement with Washington, but wariness about the risks, is their best way forward.

Emerging powers may come to yearn for the comparative restraint of traditional US administrations. They will probably continue balancing new project with Washington by continuing to pursue initiative with China. But pressure from Washington may eventually force them to limit their ties to China. This could make Europe a more attractive partner for them. ↩



Alicia García Herrero is chief economist for Asia Pacific at NATIXIS and senior fellow at Bruegel.

In President Donald Trump's second administration, the scope and objective of tariffs and protectionist measures extend beyond trade, encompassing a broader range of issues. He uses tariffs as an instrument to achieve any objective, from border control to fighting against narcotics. Against such a backdrop, it should be clear by now that the global trading system will be more and more splintered, as a 'spaghetti bowl' of tariffs is being set up either by Trump or as retaliation for his actions.

During Trump's first term, tariffs targeted China to address trade imbalances and great-power competition. This time, Trump has announced tariffs against many countries, including the United States' staunchest allies, such as Canada and Mexico. Tariffs have also been raised against China but not as severe as what Trump announced on the campaign trail, 20 versus 60 per cent. Sectoral tariffs have also been announced on steel, aluminium, on microchips, pharmaceuticals and cars.

Reciprocal tariffs are to be imposed against the whole world. The **European Union** has already been hit with steel and aluminium tariffs and is exposed to other sectoral, as well as reciprocal tariffs.

Although, the EU is not in the worst place to respond to US tariffs compared to smaller countries given its economic weight. This is also true for Asian economies, including US ally, Japan, which has been affected by aluminium and steel tariffs. India has more room given its key role in the Indo-Pacific and the general objective of containing China. Beyond reacting to tariffs, either by offering a deal or retaliating, the EU also has an important role to play, namely keeping the global trading system alive, particularly the World Trade Organization (WTO). It is in a unique position to bring together a group of middle powers that not only aim at keeping their markets open but also to go further with liberalization measures. This group of middle powers should include countries in the Global South willing to defend free trade. A strong and cohesive coalition of the willing should attract smaller countries since they are the largest beneficiaries of open and free trade. This is all the more the case as there is much more at stake than trade, based on Trump's turn against Ukraine and in Russia's favour, including at the United Nations. An EU-led coalition of the willing that aims at maintaining existing international organizations and, thereby, the global international order beyond trade and the WTO is not only welcome but more necessary than ever. ↩



Dr Hürcan Asli Aksoy

is the head of the Centre for Applied Turkey Studies at the German Institute for International and Security Affairs (SWP).

Turkey's role as a middle power has grown steadily in recent years. Its desire to shape global politics and its increasing influence in the Black Sea, the Eastern Mediterranean, Central Asia, and Africa make it a key player for Europe. In so doing, **Turkey** acts according to its national interests and its version of strategic autonomy, favouring different partners and alliances while maintaining relations with the West.

With its multi-aligned approach, Turkey seems less worried about a second Trump presidency than Europe. Trump has a close relationship with President Recep Tayyip Erdoğan, so the country's ruling elite is counting on the US president's transactionalism. Ankara believes that there is a convergence of interests with the United States on at least two issues. First, Turkey's balancing act between Russia and Ukraine positions it as a potential mediator if Trump aims to end the war in Ukraine. Second, the fall of Bashar al-Assad has strengthened Turkey's position in Syria and made it a valuable ally to the United States in the Middle East. Trump has stated that Ankara was

'key' to events in Syria. He seems interested in disengaging from the Middle East while continuing to roll back Iran's influence there. Thus, while Ankara and Washington's geostrategic interests appear to align momentarily, deep-seated structural issues – such as Ankara's acquisition of the Russian S-400 air-defence system, its exclusion from the US F-35 program, and Washington's support for Kurdish forces in northern Syria – continue to pose significant obstacles to a stable partnership. Trump and Erdoğan have a friendly personal relationship but it remains unpredictable.

In line with its multi-alignment strategy, Turkey officially announced in September 2024 its intention to join the BRICS+. If it does so as a full member or partner, it would be the first NATO member and the first long-standing EU accession candidate to play an active role in an organization that is seen as challenging the West's dominance in global politics. This would increase scepticism in European capitals and Washington D.C. about Ankara's strategic alignment and commitment to NATO. Turkey, like other middle powers, believes that the liberal world order and multilateral institutions are in decline while national sovereignty, military might, and strategic autonomy are becoming more pronounced. Trump's second term gives Ankara, with its burgeoning defence industry, the opportunity to position itself as an indispensable partner for Europe. In today's rapidly changing geopolitical reality, Europe and Turkey would be best served if they cooperate in security and defence, energy, migration and economic stability. ↗



Mauricio D. Aceves

is an advisor for security and border issues at STRATOP Risk Consulting, a Mexican Council on Foreign Relations member, and an analyst on contemporary Middle East and Central Asia issues.

As Latin America navigates a polarized world, its strategic autonomy increasingly depends on deepening existing ties and diversifying cooperation. At the same time, the continent needs to foster regional integration, to prioritize sovereignty and development, and to pursue a multilateral approach.

Can **Mexico** be a regional bridge to enhance its role as a key advocate in Latin America for cooperation, integration and global stability?


Like other emerging middle powers redefining their geopolitical identity, Mexico stands poised to contribute to the evolving multipolar world order, being positioned at the crossroads of continents and dialogues. It has adopted a blueprint to advance from being the world's 12th-largest economy to the 10th-largest in 2030. The country's foreign policy is rooted in self-determination, non-intervention and peaceful conflict resolution. This helps it to balance an assertive Washington, to diversify its economic partnerships (it was the United State's leading trade partner in 2023 and 2024) and to fulfil obligations under the United States-Mexico-Canada Trade Agreement.

Border security and domestic issues are decisive for Mexico's foreign policy and in shaping its relationship with the United States. Despite

challenges, the strategic dialogue with Washington remains driven by mutual economic and security interests. After a call with President Donald Trump over his tariffs on Mexico, President Claudia Sheinbaum announced several agreements, including on reinforcing the northern border with 10,000 National Guard personnel to prevent drug trafficking (particularly of fentanyl) into the United States and on Washington committing to stop the trafficking of high-powered firearms into Mexico.

Meanwhile, regional issues like migration, security and economic inequality intersect with global concerns and geopolitical rivalries. Three elements stand out in Latin America: the contrasting foreign policy concerns of different countries, the changing relevance of international institutions and a multipolar system set amidst different regional circumstances. However, this is shifting as Latin American leaders push for coordinated strategies to respond to political and economic changes tied to US policies. The regional realignment mirrors the global trend in which middle powers like Brazil, India and South Africa prioritize integration and cooperation in foreign policy.

Ultimately, Latin America's ability to assert its strategic autonomy hinges on security, connectivity and trade. Similar to Brazil's role in BRICS and India's balancing act between China and the United States, Mexico is uniquely positioned to leverage its US ties while expanding its trade partnerships beyond North America. The 2026 FIFA World Cup, which it will host jointly with Canada and the United States, will be a test of coordination on security and infrastructure, highlighting the country's capacity in managing cross-border cooperation.

Mexico's role as a regional bridge will depend on its ability to maintain economic pragmatism, to leverage regional cooperation and to navigate geopolitical pressures. 



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In the first quarter of 2025, I had the unique opportunity to attend two major international gatherings: the Munich Security Conference and the ASEAN Futures Forum in Hanoi.

The mood in Munich was gloomy, reflecting the serious fractures in the transatlantic alliance. But the atmosphere in Hanoi was one of cautious optimism, driven by the economic prospects of Vietnam and **Indonesia** and by the controlled situation in the South China Sea. Whatever the difference in mood between Munich and Hanoi there are two things we can be sure of: more alignments and realignments are inevitable, and regions will become more important.

Over 30 countries are reportedly lining up to become BRICS members or partners, signalling a shift in the world's centre of gravity. Indonesia joined in 2025 after years of hesitation, and Malaysia and Thailand have applied for membership. Such new alignments do not necessarily exclude the United States. ASEAN countries have stressed that they will work with whoever occupies the White House, and Southeast Asia has so far been spared by the United States' disruptive moves elsewhere. In the wider Indo-Pacific, India seems very comfortable with the second Trump administration.


Regionalization is growing in importance as confidence in the 'rules-based world order' wanes. In Southeast Asia, strategic trust and cooperation mechanisms support this shift. During Malaysia's chair in 2025, ASEAN will launch strategic plans to deepen the ASEAN Community for the next 20 years. Prime Minister Anwar Ibrahim has stressed that it must be a 'beacon of hope' and continuously reaffirms its centrality amid changing contingen-

cies. ASEAN countries intend to close ranks and play a constructive role on the world stage. This emphasis on regional cohesion aligns with the broader global trend in which multipolarity is solidifying and middle powers are finding greater agency.

There are about two dozen middle powers in the world today. Most of them, in the Global South, embrace strategic autonomy and are given to constant hedging. Even BRICS is said to be a grouping of middle powers despite China and Russia looming within it.

As the rift within the Western alliance accelerates the shift to multipolarity, the agency of middle powers and regional blocs like ASEAN will grow stronger. The post-Second World War power structures that once dictated global affairs are giving way to a more fluid approach to diplomacy in which strategic autonomy and economic pragmatism take precedence. The ASEAN Futures Forum in Hanoi underscored this reality, demonstrating that regional cohesion, economic resilience and refusal to be drawn into great-power rivalries can be a viable path forward.

While Europe grapples with its shifting alliances, ASEAN is moving forward with a pragmatic, opportunity-driven approach, balancing cooperation with major powers while strengthening its regional identity. The global situation is no longer a matter of great-power rivalry; it is one of middle powers increasing their influence through strategic decisions that will define a new era of international relations. While the push for reform at the United Nations continues to be pursued, many other strategic spaces – whether bilateral, minilateral regional or multilateral – remain where the middle powers of the Global North and Global South can find alignments. To cooperate with the Global South, Europe can first optimize engagement through various existing mechanisms and frameworks such as the ASEAN Dialogue Partners mechanism, the ASEAN Outlook on the Indo-Pacific, the G20, and the Asia-Europe Meeting.

Even in these challenging times for international cooperation, it is not the end of the world; new opportunities are there to be unlocked, and new partnerships can be forged. Now is the time to seize them. 

The 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, emerging middle powers are key players in addressing global challenges. Their role in fostering international collaboration and strategic alignment has never been more important: Brazil's role as the host of COP30, alongside its BRICS presidency, and South Africa's G20 presidency are just two examples

of this in 2025. From Germany's perspective, Donald Trump's return to the White House makes stronger ties with emerging middle powers even more crucial.

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 for International Affairs. Through these activities, the initiative contributes to a deeper understanding of the geopolitical perspectives of emerging middle powers.

The *Körber Emerging Middle Powers Initiative* aims to further this knowledge by bringing together experts and decision-makers from Brazil, India and South Africa as well as other emerging middle powers with their German counterparts, fostering an active exchange and a deeper understanding of these perspectives and traditions.



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