

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



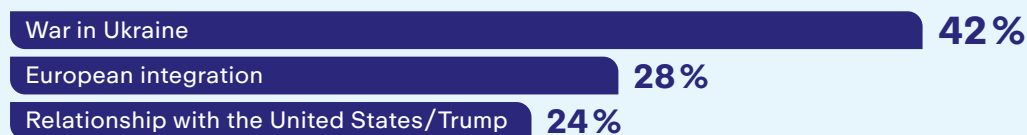
India



South Africa



Germany



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

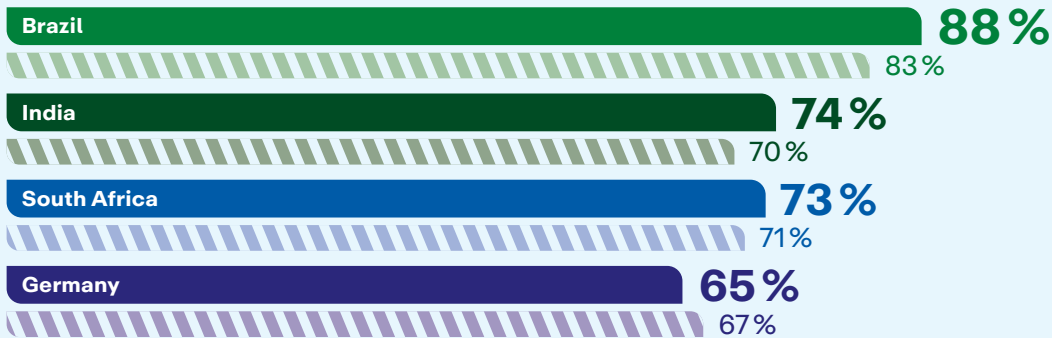


Compare with
results from 2023

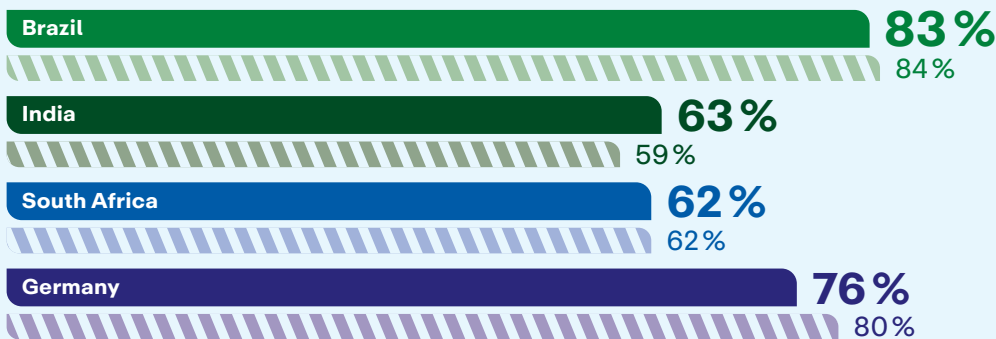
Architects of Foreign Policy

Who shapes the foreign policy of your country the most?

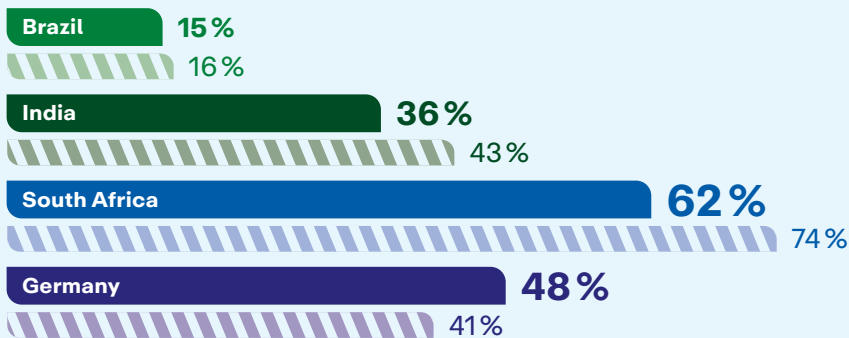
Ministry of Foreign Affairs



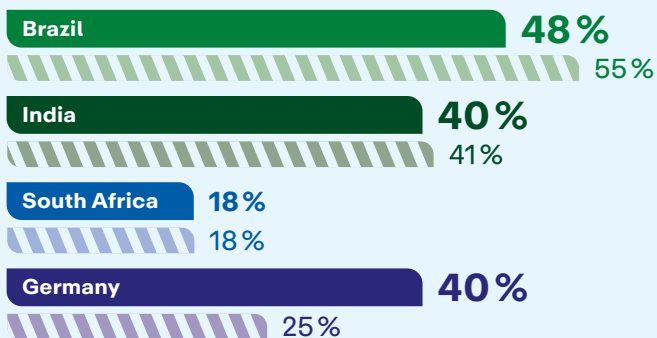
Head of government





Ruling political parties



Business sector

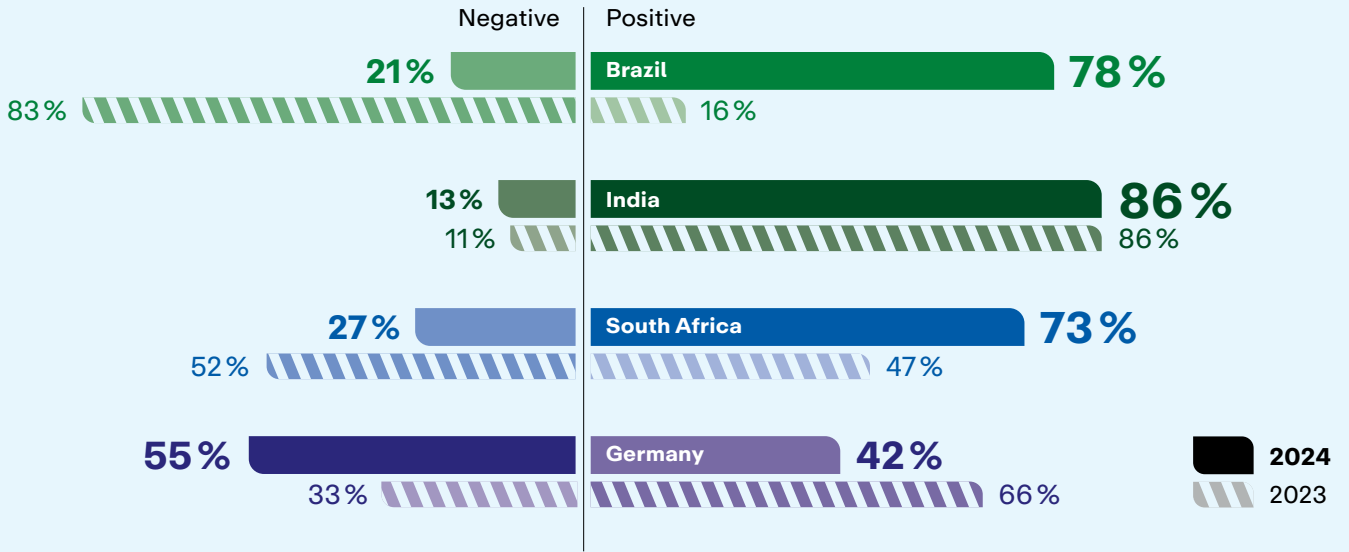


 2024
 2023

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



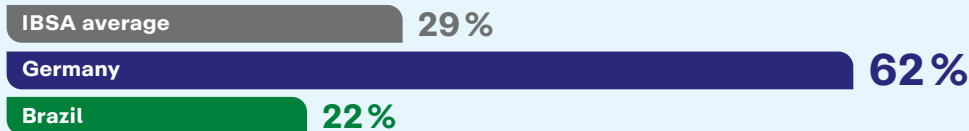
Enable technology transfers



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



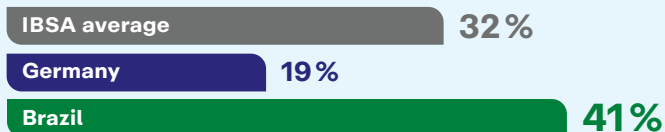
Offer trade concessions



Take the lead in reforming multilateral institutions



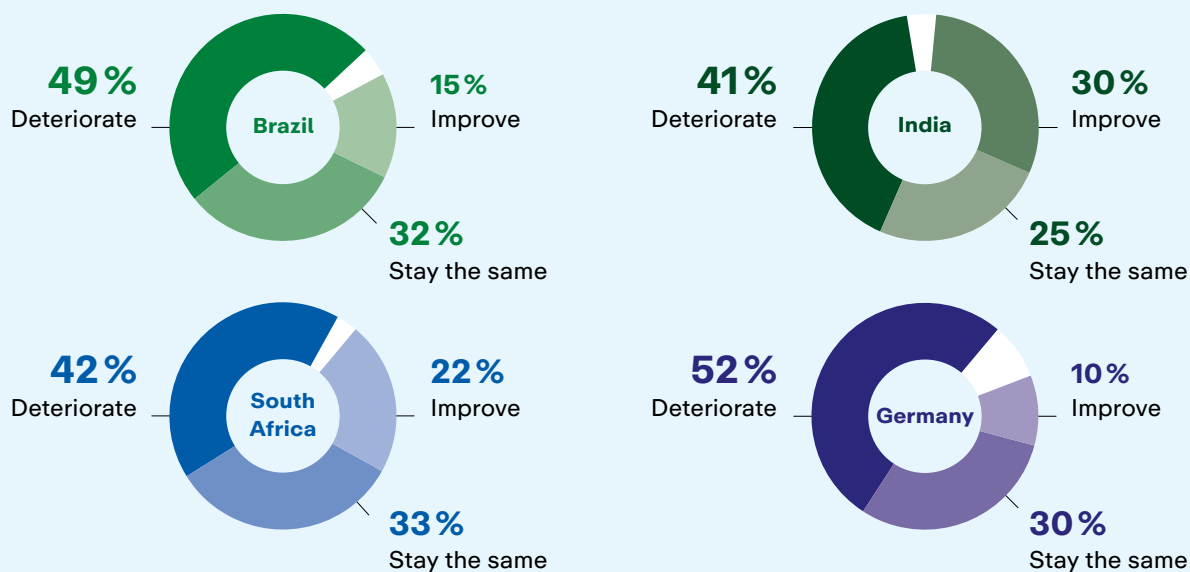
Support open research and development



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

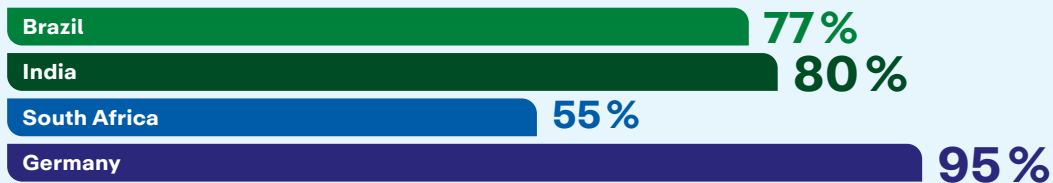
Unexpected common ground

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.



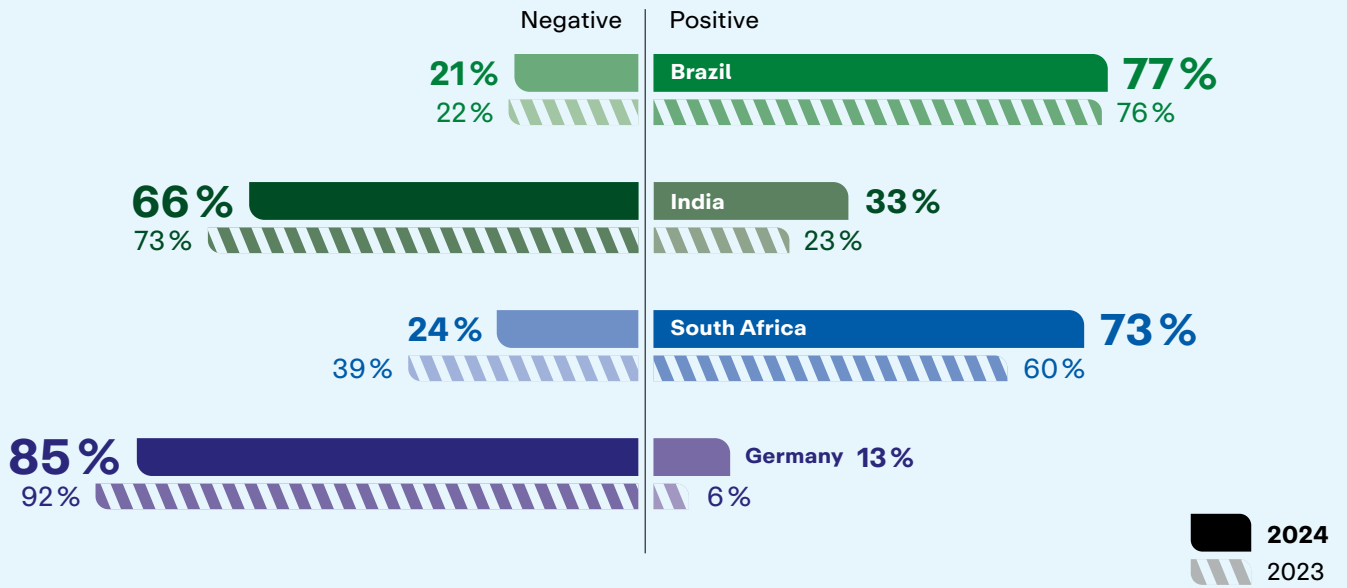
The West has lost credibility as a defender of global norms.



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

Less China scepticism

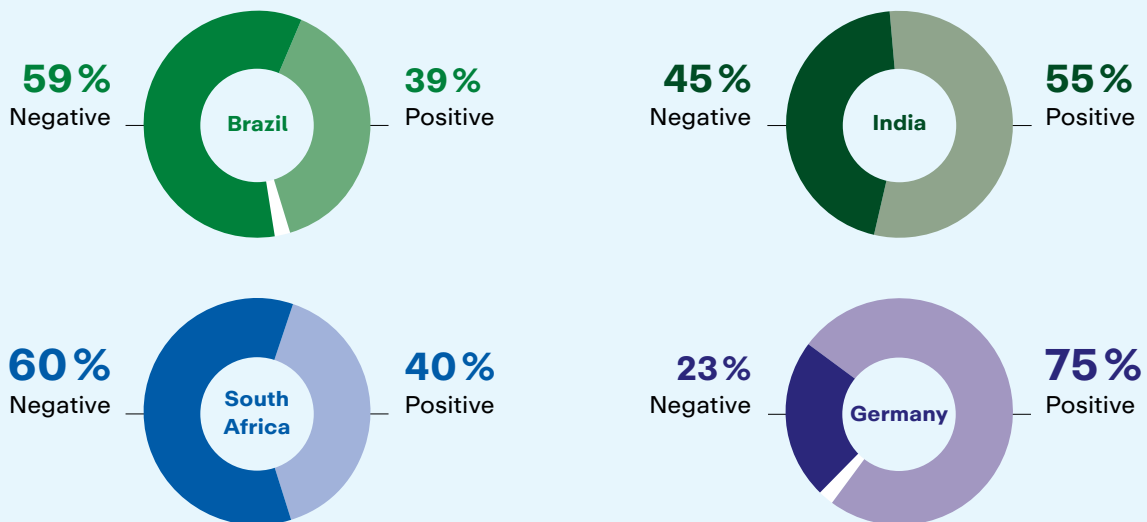
How do you evaluate China's influence globally?



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

Declining US credibility

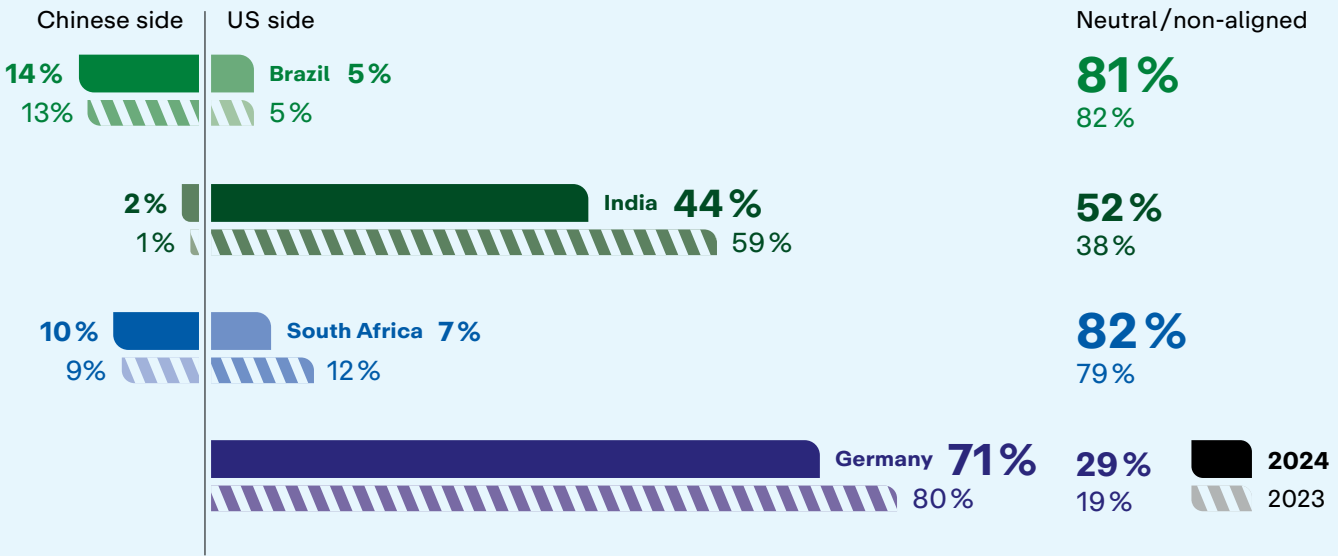
How do you evaluate the influence of the United States globally?



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?

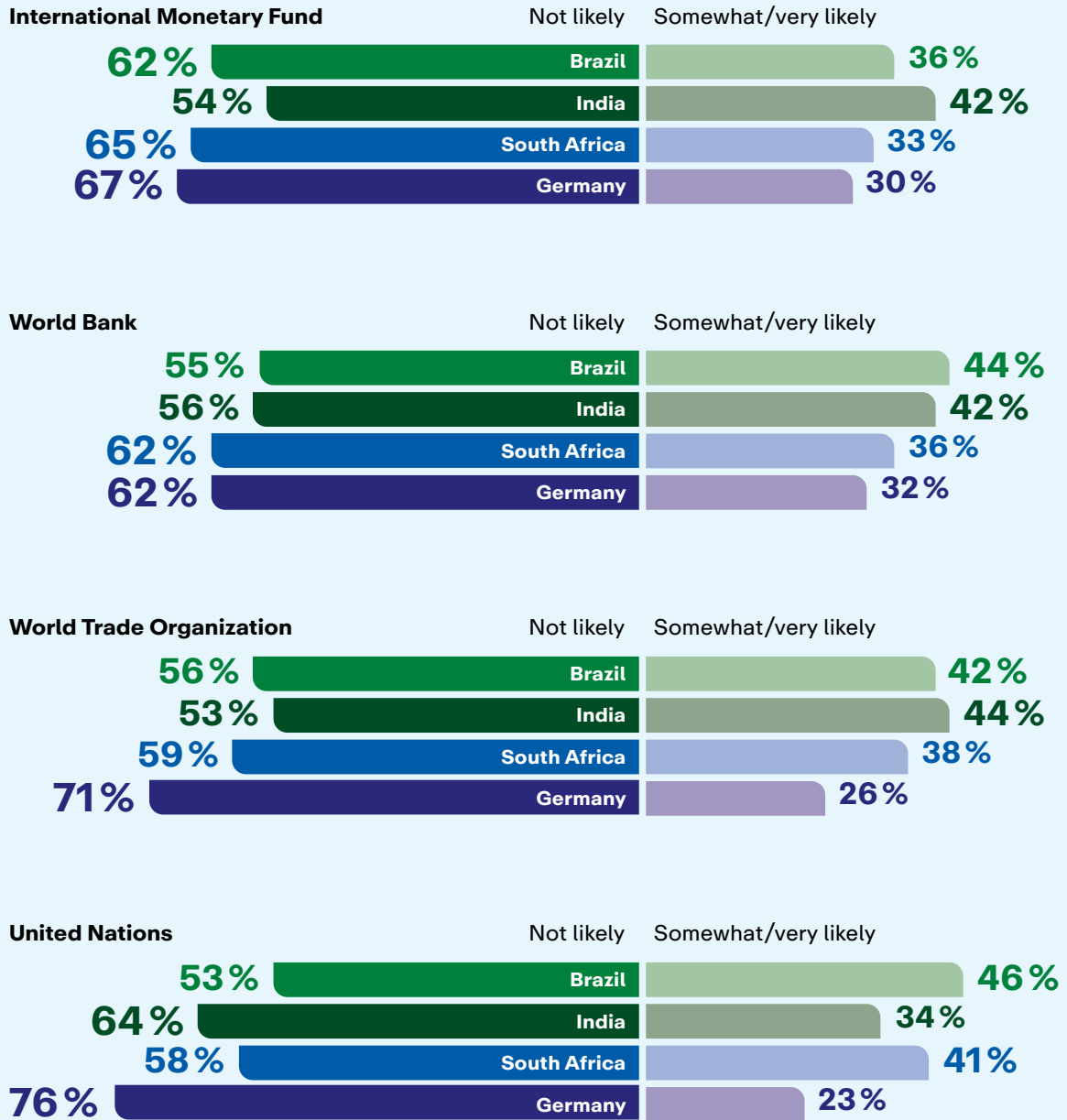
extremely important



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

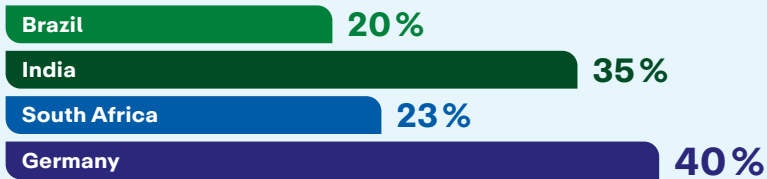
Divided on BRICS

What is your main expectation of BRICS?

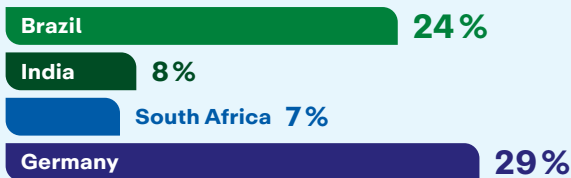
Promoting economic cooperation and growth



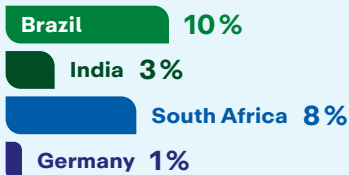
Balancing Western countries' influence



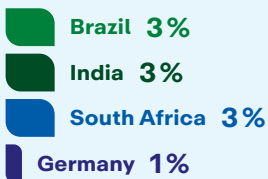
Enhancing political influence



Increasing technological and scientific exchange



Strengthening sustainable development and environmental protection



Enhancing security and defense cooperation

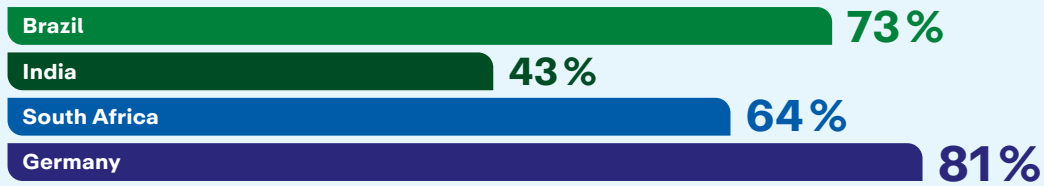


answer 'don't know' and 'no answer' ranged from 0 to 7 per cent for all issues

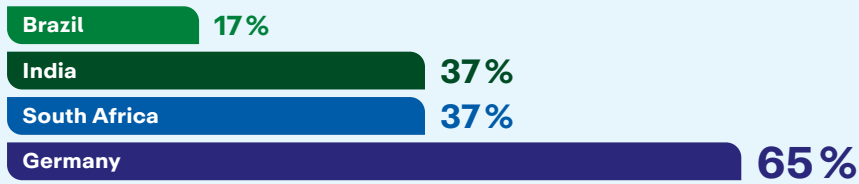
Protectionism beats fair trade?

Regarding international trade, do you agree with these statements?

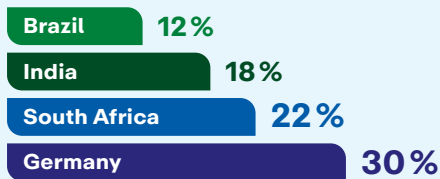
My country suffers from Chinese-US trade war.



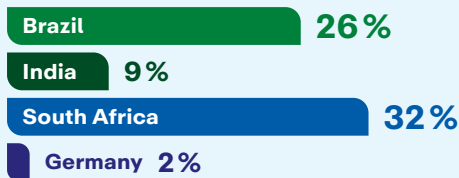
European Union's practices are fair.



Unites States' practices are fair.



China's practices are fair.



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



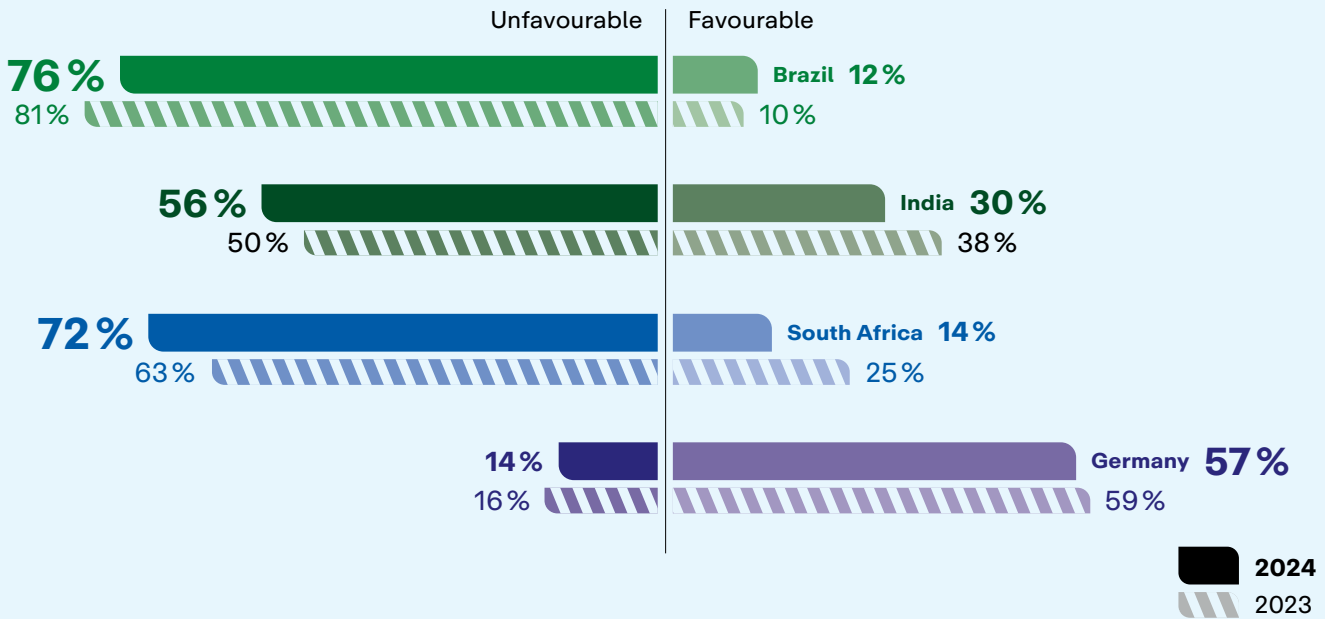
Protectionist measures should be accepted if used to protect the environment.



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?

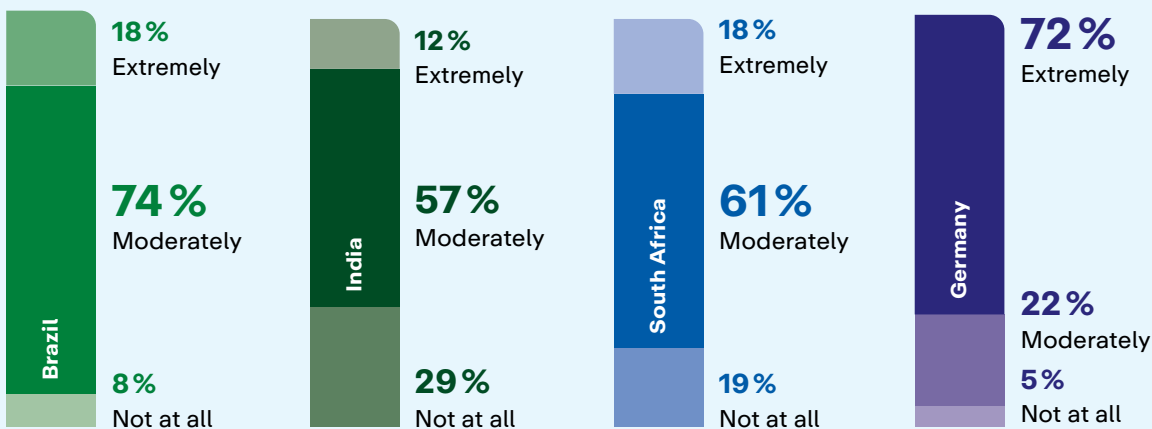


Answer 'no impact' ranged from 4 to 12 per cent for all issues.

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.



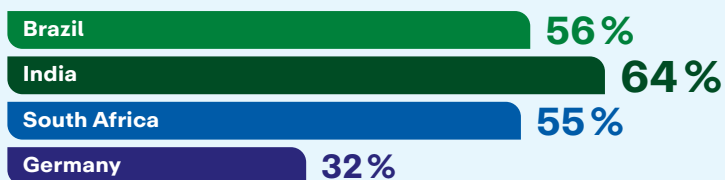
My country's energy transition needs global financial support.



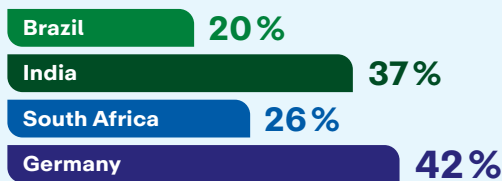
My country will shift to cleaner energy in the next five years.



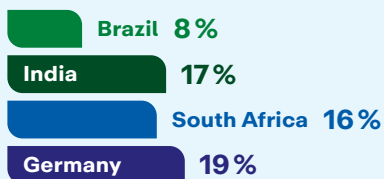
Environmental protection conflicts with economic growth.



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.