



Emerging Powers and the Future of American Statecraft

Christopher S. Chivvis and Beatrix Geaghan-Breiner



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By Christopher S. Chivvis and Beatrix Geaghan-Breiner

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SUMMARY

The structure of international politics is changing in ways that are not fully appreciated in Washington. The United States has paid a great deal of attention to the rise of China in the last decade but much less to emerging powers whose rise will also shape the operating environment for American statecraft. No single emerging power will have an impact tantamount to China's, but they will have a significant impact collectively due to their geopolitical weight and diplomatic aspirations.

America has limited ability to influence the trajectory of these emerging powers, identified in this report as Argentina, Brazil, India, Indonesia, Mexico, Nigeria, Saudi Arabia, South Africa, Thailand, and Türkiye. They have taken stances that contrast or directly clash with U.S. positions on China and on Russia over the past few years. Nearly all have voiced concerns about Washington's approach to the war in Ukraine, even as they criticized Moscow's invasion. Almost none would line up with the United States in a confrontation with China. Instead, they are likely to pursue highly self-interested foreign policies. Washington should expect that they will increasingly challenge some of its policies, sustain relationships with its adversaries, and press their own agendas on the global stage.

The emerging powers' statecrafts are shaped in large part by their drive for economic security. But their geographies, different preferences for world order, domestic politics, and defense relationships also play a role. Concerns about the strength of democracy in other countries, which has played an animating role in U.S. foreign policy for decades, are a lower priority for them, no matter how democratic they are.

It will be a mistake for the United States to frame its relations with these emerging powers primarily as part of a competition for influence with China and Russia, however tempting it may be to do so. These powers are not swing states that will tilt decisively toward either side in a global great power competition. Most will resist any efforts to bring them into a U.S.-led camp as in the Cold War. Trying to make them do so would also risk strategic overreach by embroiling the United States too deeply in the emerging powers' domestic politics or by expending its resources in pursuit of building ties that never materialize.

A better approach for the United States would be to focus on negotiating interest-based deals with emerging powers while cordoning off areas of disagreement. These might include tailored market access and investment agreements, agreements on technology manufacturing, energy transition initiatives, efforts to combat deforestation, efforts to build public health infrastructure, and infrastructure investments. It would be wasteful of the United States to offer these countries security guarantees, but in some cases providing security assistance can serve its interests. Washington should accept that most of these countries will maintain close diplomatic, economic, and sometimes security relationships with China and probably Russia.

Over the longer term, it will serve U.S. interests to strengthen the sovereignty of emerging powers when possible and cost-effective to do so. This will provide a bulwark against the undue expansion of China's power and influence and help ensure that, even if they do not side with the United States, they are not drawn closely into the orbit of its major geopolitical competitors. Strengthening emerging powers' sovereignty will also help boost their development as constructive powers with a stake in sustaining a peaceful world order conducive to global economic growth.

INTRODUCTION

The realization in 2022 that many emerging powers were unwilling to back the United States' response to Russia's invasion of Ukraine occasioned concern in Washington about what had gone wrong. Many policymakers wondered how countries that had suffered under the yoke of imperialism and now witnessed Moscow's brutal aggression could provide only minimal backing for U.S. efforts to build a global sanctions regime and provide Ukraine with weapons. Washington's effort to build a truly global coalition against the Kremlin was hampered as a result. The coalition in place now consists primarily of the United States, its allies in Europe, and a few important allied democracies in Asia, such as Japan and South Korea. A similar pattern has developed in the United States' unfolding competition with China for global power and influence as their relations have deteriorated in recent years. Many emerging powers have been reluctant to line up behind Washington against Beijing. If this competition intensifies, Washington may be tempted to push even harder to bring emerging powers into a U.S.-led bloc, but this would be extremely difficult.

These countries are unlikely to swing decisively in one direction or the other. Writing them off is also unlikely to work. The size of their economies and populations, and their rising global influence, endows them with considerable significance. They have the potential to advance or obstruct many U.S. global interests. Finally, the rift between them and the United States over Israel's bombing of Gaza following Hamas's terrorist attacks on October 7, 2023, makes it more imperative for U.S. policymakers to fully understand their views.

The United States cannot ignore the emerging powers, but it needs a strategy toward them that avoids overreaching in a fruitless effort to win them to its side. The core of this strategy should be identifying pragmatic initiatives on shared interests in areas such as market access and investment, technology, the energy transition, pollution and deforestation, public

health, and infrastructure. In the process, the United States should aim to strengthen the emerging powers' sovereignty and boost their rise as constructive members of an international system in which they can act independently of China or Russia's influence. This will require compartmentalizing areas of common interest and cordoning these areas off from ones of disagreement.

The United States cannot ignore the emerging powers, but it needs a strategy toward them that avoids overreaching in a fruitless effort to win them to its side.

At a time when U.S. policymaking is dominated by concern about China and Russia, this will be easier said than done. Not only are there likely to be many areas of disagreement with emerging powers, but the intensifying U.S. rivalry with China may increase domestic pressure to frame the whole of foreign policy through the lens of strategic competition. A compartmentalized approach focused on building these countries' sovereignty and working toward common interests is most likely to serve U.S. long-term interests.

TEN EMERGING POWERS

To determine what approach the United States should take toward emerging powers, this report looks at ten of the most important emerging powers in economic and strategic terms. They are part of what is often called the Global South, spanning Africa, Asia, Latin America, and the Middle East. They make up about a third of the world's population and a fifth of its economic production (see figure 1).¹ They include three members of the original BRICS—Brazil, India and South Africa—and five other members of the G20: Argentina, Mexico, Indonesia, Saudi Arabia, and Türkiye (see box 1).² The other two countries included in this report are Nigeria and Thailand.

We chose these ten countries primarily based on the current and future size of their economies and populations but also took into account their rising diplomatic ambition and strategic significance. We also aimed for some degree of geographic diversity. This meant that we were not able to include a few countries, such as the Philippines, that might have been included based solely on economic and population criteria.

Figure 1. The Ten Emerging Powers



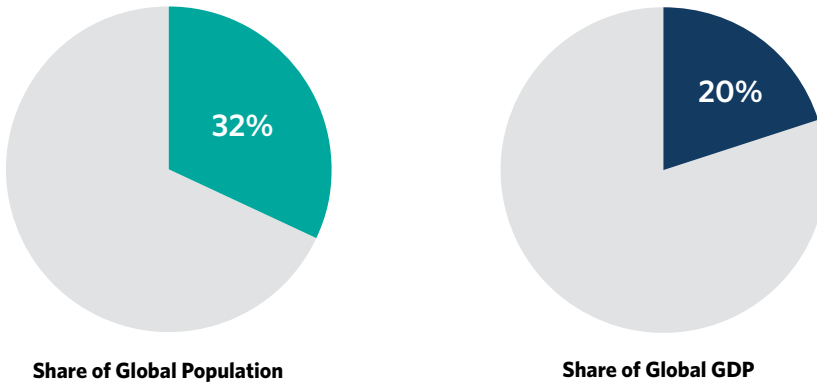
Note: This map is illustrative; boundaries, names, and designations used do not represent or imply any opinion on the part of Carnegie or the authors. Dotted lines represent approximate disputed boundaries and the light teal areas represent contested territory between China, India, and Pakistan. The final status has not yet been agreed upon.

These countries thus are representative of but not constitutive of the Global South. They are among the world’s “middle powers” but do not represent that grouping, which also includes countries such as Germany and South Korea. “Middle powers” is a static term and does not convey the dynamism that these emerging powers will bring to the future world political order. Although these are “rising powers,” they are not constitutive of that category, which would also include China. “Hedgers” and “swing states” are sometimes used to describe this group, but as analytic terms these preconfigure conclusions in ways that we wish to avoid.

Each of these countries has a large economy, with most weighing in above half a trillion dollars and larger than those of, say, Poland, Sweden, or Taiwan. India has by far the largest population among them, but Brazil, Indonesia, Mexico, Nigeria, and Türkiye each has a population larger than that of Germany. They make up more than half of the Global South’s gross domestic product (GDP) and nearly half of its population (see figures 2 and 3).

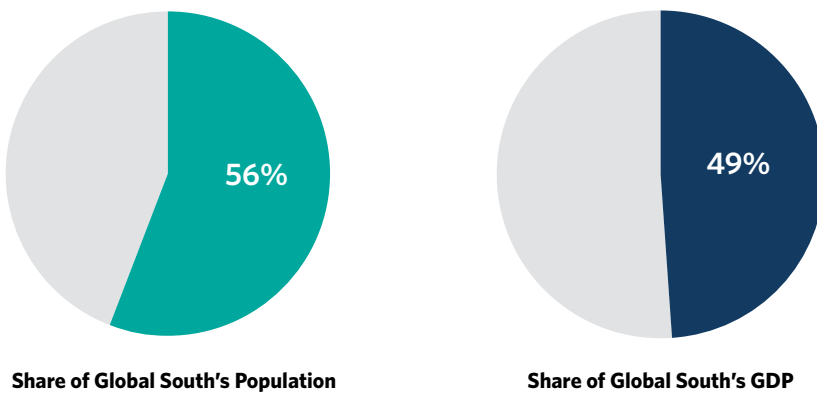
Moreover, these emerging powers are almost certain to have an even greater weight on the global stage in the next two decades.³ They have fast-growing markets and are quickly climbing the ranks of the largest economies. Some economists predict that by 2050, Brazil, India, Indonesia, and Mexico will be among the seven largest economies in the world.⁴ Some of the ten emerging powers are projected to undergo two- or threefold growth between now and 2050 (see figure 4), as well as significant population increases (see figure 5).

Figure 2. Emerging Powers' Share of Global Population and GDP



Sources: United Nations Population Fund, "World Population Dashboard," <https://www.unfpa.org/data/world-population-dashboard>; World Bank, "World Development Indicators Database," July 1, 2023, https://databankfiles.worldbank.org/public/ddpext_download/GDP_PPP.pdf

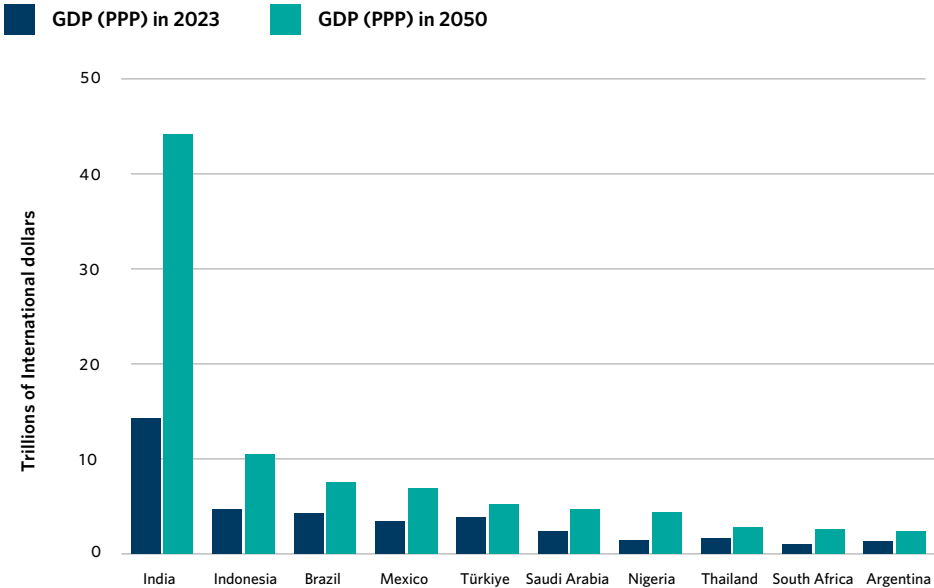
Figure 3. Emerging Powers' Share of Global South's Population and GDP



Note: "Global South" includes the countries that the United Nations classifies as developing countries in its 2023 "World Economic Situation and Prospects" report.

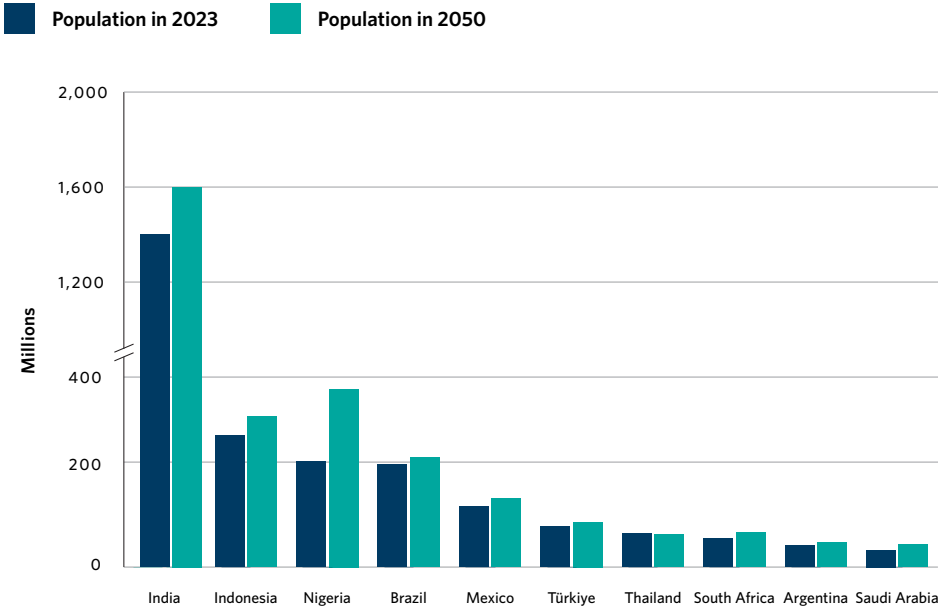
Sources: United Nations, "World Economic Situation and Prospects 2023," January 25, 2023, 118, <https://www.un.org/development/desa/dpad/publication/world-economic-situation-and-prospects-2023>; World Bank, "World Development Indicators Database," July 1, 2023, https://databankfiles.worldbank.org/public/ddpext_download/GDP_PPP.pdf; and United Nations Population Fund, "World Population Dashboard," <https://www.unfpa.org/data/world-population-dashboard>.

Figure 4. Emerging Powers' Economic Projections for 2050



Source: For 2023 GDPs, see International Monetary Fund, “World Economic Outlook (October 2023),” <https://www.imf.org/external/datamapper/PPPGDP@WEO/OEMDC/ADVEC/WEOWORLD>; For 2050 projections, see PWC Global, “The World in 2050,” February 2017, <https://www.pwc.com/gx/en/research-insights/economy/the-world-in-2050.html>.

Figure 5. Emerging Powers' Population Projections for 2050

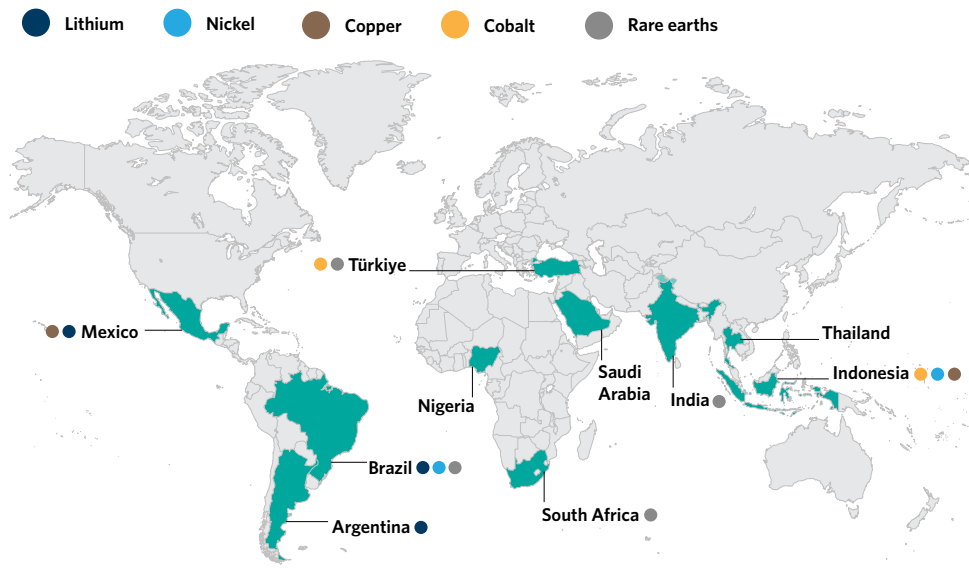


Source: UN Population Fund, “World Population Dashboard,” <https://www.unfpa.org/data/world-population-dashboard>; and UN Population Prospects 2022, <https://population.un.org/wpp/>.

As their economies grow, these emerging powers have become more active in international affairs. Thailand and Türkiye are the only members of the group that are allies of the United States, and both often pursue independent policies despite their alliance. Most have a history of colonial domination. Their domestic regimes vary: Freedom House rates Argentina, Brazil, and South Africa as “free;” Saudi Arabia, Thailand, and Türkiye as “not free;” and India, Indonesia, Mexico, and Nigeria as “partly free.”⁵

Some, such as Indonesia and Türkiye, offer unique strategic-military value for the United States—or its adversaries. They also hold a sizable amount of the world’s critical minerals, which will become increasingly important to the United States in the context of the clean energy transition (see figure 6).⁶

Figure 6. Emerging Powers’ Reserves of Critical Minerals



Source: U.S. Geological Survey, "Mineral Commodity Summaries," January 31, 2023, <https://pubs.usgs.gov/publication/mcs2023>.

Note: This map is illustrative; boundaries, names, and designations used do not represent or imply any opinion on the part of Carnegie or the authors. Dotted lines represent approximate disputed boundaries and the light teal areas represent contested territory between China, India, and Pakistan. The final status has not yet been agreed upon.

APPROACH AND OUTLINE

To assess the positions of these ten emerging powers on the war in Ukraine and on U.S.-China competition, we analyzed how they voted on several UN General Assembly resolutions, as well as their trade and investment patterns with China, Russia, and the United States. We also examined public statements by their leaders, the nature of their defense relationships, and their diplomatic behavior over time. In addition, we conducted off-the-record interviews with high-level diplomats from these countries about their positions on the war in Ukraine, China, and the international order. We sought to ascertain the extent to which these positions were shaped by their economic interests, domestic politics, geographies, visions of the international order, Chinese or Russian propaganda, and concerns for democracy and human rights abroad. We also held off-the-record roundtables with key senior officials from the White House, in an effort to understand their thinking and perspectives on the policy challenges for the United States. In the process, we published individual case studies for each country.⁷

The next two chapters of this report outline the positions these ten emerging powers have taken on the war in Ukraine and on U.S.-China competition and evaluate the degree of their alignment with the United States. Overall, the emerging powers are loath to pick a side in strategic competition between great powers. Their approaches to the war in Ukraine and U.S.-China competition have, for the most part, involved striking a middle ground. Some have pursued courses of action that run counter to the strategic objectives of the United States; others have acted in closer alignment with it.

The following chapter then analyzes the underlying factors driving the emerging powers' positions and identifies which factors are most important. The conclusion proposes a U.S. strategy toward these powers and points out pitfalls to avoid.

Box 1: The BRICS and the Emerging Powers



Brazilian President Luiz Inácio Lula da Silva, Chinese President Xi Jinping, South African President Cyril Ramaphosa, Indian Prime Minister Narendra Modi, and Russian Foreign Minister Sergei Lavrov attend the BRICS Summit in Johannesburg on August 23, 2023. (Photo by ALET PRETORIUS/POOL/AFP via Getty Images)

In 2001, Goldman Sachs economist Jim O'Neill made the case for why a new group of countries—Brazil, Russia, India, and China (BRIC)—would become increasingly important in the global economy.⁸ According to him, they stood out because their large market economies showed robust growth. In 2003, Goldman Sachs further predicted that by 2040, the collective GDP of the BRICs would overtake France, Germany, Italy, Japan, the United Kingdom, and the United States (labeled the G6).⁹ There are similarities between the ten emerging powers in this report and the BRICs in terms of their potential future weight in world affairs.

When Goldman Sachs published its projections, the BRIC economies amounted to less than 15 percent of the G6's GDP in U.S. dollars. With South Africa having joined the group in 2010 to form the BRICS, the group now makes up about 60 percent of the G6's GDP in U.S. dollars. The BRICS are surpassing Goldman Sachs' predictions—in its 2003 forecast for 2025, the BRICS totaled only 53 percent of the G6.

The ten emerging powers, which include three BRICS members, seemed important twenty years ago and are proving even more so now in terms of population size, economic weight, and geopolitical significance. They account for about 30 percent of the G6's GDP in U.S. dollars.¹⁰ And their population is more than three times larger than that of the G6.

POSITIONS ON THE WAR IN UKRAINE

When Russia invaded Ukraine in 2022, many in Washington expected the rest of the world to join the United States not only in denouncing but also in punishing Russia for its gross violation of international law. Most traditional U.S. allies in Asia and Europe did so, denouncing Russia's actions, placing unprecedented sanctions on it, and giving major support for Ukraine's defense and economy. However, much of the rest of the world was reluctant to go beyond denunciation. All ten emerging powers in this report have remained neutral in the war. Their positions vary—a couple have remained strictly nonaligned, while others have leaned toward Ukraine but refused to take actions against Russia—but none has followed the U.S. line closely. Some have attempted to broker peace between Russia and Ukraine at multiple points since 2022.

Nearly all of the emerging powers expressed sympathy for Kyiv's plight, and many of them condemned Moscow. Nevertheless, none has joined the United States in imposing sanctions on Russia, and most have not supplied weapons to Ukraine. Moreover, some have directly clashed with the U.S. position on the war, and, in contrast with Western countries, several have pushed for negotiations (see box 2).

Table 1 shows the emerging powers' voting at the UN General Assembly and their positions on sanctions and military assistance. The table also shows the extent to which they have voted and taken positions similar to the United States, indicated in green.

Table 1. Emerging Powers' Positions on the War in Ukraine

Country	UN Resolution ES-11/1 to condemn Russia's invasion	UN Resolution ES-11/2 to call for a full Russian withdrawal	UN Resolution ES-11/3 to suspend Russia's membership on the Human Rights Council	UN Resolution ES-11/4 to declare Russia's referenda in occupied Ukrainian territories illegitimate	UN Resolution ES-11/5 to declare Russia liable for war reparations	UN Resolution ES-11/6 to condemn Russia's invasion and call for an end to the war	Imposed sanctions on Russia in 2022	Sent military assistance to Ukraine post-invasion
India	Abstained	Abstained	Abstained	Abstained	Abstained	Abstained	No	No
South Africa	Abstained	Abstained	Abstained	Abstained	Abstained	Abstained	No	No
Thailand	In Favor	In Favor	Abstained	Abstained	Abstained	In Favor	No	No
Brazil	In Favor	In Favor	Abstained	In Favor	Abstained	In Favor	No	No
Indonesia	In Favor	In Favor	Abstained	In Favor	Abstained	In Favor	No	No
Nigeria	In Favor	In Favor	Abstained	In Favor	Abstained	In Favor	No	No
Saudi Arabia	In Favor	In Favor	Abstained	In Favor	Abstained	In Favor	No	No
Mexico	In Favor	In Favor	Abstained	In Favor	In Favor	In Favor	No	No
Argentina	In Favor	In Favor	In Favor	In Favor	In Favor	In Favor	No	Yes
Türkiye	In Favor	In Favor	In Favor	In Favor	In Favor	In Favor	No	Yes

Sources: For votes, see United Nations Digital Library, <https://digitallibrary.un.org/?ln=en>. For sanctions, see Norman Eisen et al., "The Brookings Sanctions Tracker," July 19, 2023, <https://www.brookings.edu/articles/the-brookings-sanctions-tracker/>. For military assistance, see "Ukraine Support Tracker," Kiel Institute for the World Economy, February 16, 2024, <https://www.ifw-kiel.de/topics/war-against-ukraine/ukraine-support-tracker/>.

VOTING AT THE UN GENERAL ASSEMBLY

The UN General Assembly voting record supports the view that most of the ten emerging powers oppose Russia's invasion and are concerned about the war. Yet they are also reluctant to support measures they perceive as potential obstacles to a negotiated settlement. Eight of them voted in favor of Resolutions ES-11/1, ES-11/2, and ES-11/6, which condemned Russia's invasion, reaffirmed Ukraine's sovereignty, and demanded a full withdrawal of Russian forces. Argentina and Türkiye went further by voting in favor of three additional Ukraine-related resolutions. By contrast, India and South Africa abstained on every resolution.

Two resolutions did prove controversial. Eight of the ten emerging powers criticized Resolution ES-11/3 to suspend Russia's membership in the UN Human Rights Council as setting a precedent for excluding nations from international forums and potentially hindering Russia's inclusion in any future UN negotiations.¹¹ Seven of them abstained on Resolution ES-11/5 to declare Russia liable for war reparations, asserting that they wanted to avoid any steps that could make reaching a political settlement with Russia more difficult.¹²

NO SANCTIONS ON RUSSIA

Despite their willingness to join in some of these diplomatic measures, none of the ten emerging powers has sanctioned Russia.¹³ They have defended their reticence to sanction in several ways. Some, such as Brazil and Türkiye, said that they would only support sanctions approved by the UN Security Council—something impossible due to Russia's veto power on the council.¹⁴ Argentina and Indonesia said that they did not see sanctions as a mechanism for peace, while South Africa expressed concern that sanctions could prolong the conflict.¹⁵ Mexico explained that it would not impose sanctions because it wanted positive relations with all governments.¹⁶ When Luiz Inácio Lula da Silva was running for Brazil's presidency in 2022, his top foreign policy adviser said that isolating Russia could provoke it further and raise the likelihood of nuclear war.¹⁷

CONTINUED ECONOMIC TIES TO RUSSIA

India, Saudi Arabia, and Türkiye have in fact enhanced their trade and economic ties with Russia since it invaded Ukraine, sometimes taking advantage of opportunities created by its economic isolation from the West. India began to buy cheap Russian oil in bulk after

the invasion, leading to skyrocketing imports. For example, in December 2022, India imported thirty-three times more Russian crude than it had a year prior.¹⁸ Indian officials have defended these oil purchases as necessary to satisfy the high energy needs of the country's large population.¹⁹ Türkiye's exports to Russia surged by over 60 percent in 2022, compared with the previous year.²⁰ These exports—many originating in other countries—included semiconductors, machinery, vehicles, and spare parts for the Russian army.²¹ In early 2023, Türkiye clamped down on the transit of sanctioned goods to Russia after the United States raised concerns about the problem.²² Meanwhile, Saudi Arabia has coordinated with Russia through the Organization of the Petroleum Exporting Countries (OPEC) to make large oil production cuts, ignoring Washington's requests that it increase output.²³

LIMITED MILITARY SUPPORT TO UKRAINE

Eight of the ten emerging powers have not sent weapons to Ukraine. This has been of limited importance on the battlefield, given that their militaries have limited stocks of weapons compared to countries in the North Atlantic Treaty Organization (NATO) or have none of relevance. However, Argentina and Brazil were thought to have useful military equipment and were asked by NATO members to contribute to Ukraine's defense. For example, in January 2023, Germany's Chancellor Olaf Scholz traveled to Brazil and asked the recently elected Lula to provide ammunition to be used by German-made Leopard tanks in Ukraine, but Lula declined to do so.²⁴ Scholz also visited Argentina, whose administration at the time rejected calls to send weapons to assist Ukraine, even though the country had two Mi-17 Soviet-era helicopters that could help Ukraine on the battlefield. In December 2023, however, after President Javier Milei took office, Argentina decided to send the helicopters to Ukraine after being offered financial compensation from the United States.²⁵

Türkiye is a special case among these emerging powers as the only NATO member and the only country geographically close to the war. It has provided Ukraine with Bayraktar drones and armored vehicles.²⁶ Ankara has also sought a mediation role, and it was vital to the negotiation of the Black Sea Grain Initiative that from July 2022 until Russia's withdrawal a year later ensured that food supplies would flow through the Black Sea. However, its lax attitude toward flows of third-party sanctioned goods to Russia worked against the impact of these contributions to Ukraine's war effort.²⁷

In May 2023, the United States accused South Africa of having covertly supplied weapons to Russia, an accusation that came a few months after South Africa held joint naval exercises with Russia and China.²⁸ South African President Cyril Ramaphosa denied the charge and established an independent investigation that found no evidence of a weapons transfer.²⁹

SOMETIMES OPENLY CRITICAL OF THE U.S. APPROACH

Some leaders of the emerging powers have not only refused to join the coalition against Russia but have also criticized the United States' approach to the war. In September 2022, Turkish President Recep Tayyip Erdoğan said that the West's attitude toward Russia was "a policy based on provocations."³⁰ In the months after the invasion, Mexican President Andrés Manuel López Obrador called NATO's policy toward Ukraine "immoral" and argued that Western sanctions and arms shipments "only served to aggravate the conflict."³¹ On a trip to China in April 2023, Brazil's Lula accused the United States of "encouraging the war."³² Such statements can seem starker than intended if taken out of context, and they tend to reflect domestic politics as much as foreign policy priorities, as discussed in the fourth chapter. But it would be unwise to dismiss them altogether.

To summarize, the emerging powers have taken varying approaches to Russia. Two powers have downgraded diplomatic ties with Russia since the war in Ukraine began: Argentina seems to have been motivated in part by disapproval of the invasion,³³ while the waning of Nigeria's relations is part of a broader trend that has seen Russia lose leverage in Africa because it has much less to offer the continent's states.³⁴ The other powers have maintained or expanded their ties with Russia since the invasion. Many of them have economic or historical relationships with Moscow that have made turning against it difficult, as explained in a later chapter.

Box 2: Ukraine and the Emerging Powers' Diplomatic Aspirations

Five of the ten emerging powers have tried to broker peace by proposing their own plans, sending delegations to Moscow and Kyiv, or working to negotiate diplomatic deals. To some degree, these initiatives can be seen as messaging to their domestic audiences, but they are also evidence of new diplomatic ambition and reflect views that contrast with those of the United States and its allies.

Türkiye's Erdoğan has maintained a working relationship with Russian President Vladimir Putin despite several regional conflicts that divide Türkiye and Russia. This has increased Türkiye's ability to conduct negotiations with Russia over Ukraine. Türkiye's rights in the Montreux Convention, which allows it to close access to the Black Sea through the Bosphorus and Dardanelles straits, also enabled Ankara to push through the Black Sea Grain Initiative, the only deal between Russia and Ukraine since the war began. In 2022, Mexico's López Obrador called for the creation of a UN mediation committee that would serve as a diplomatic channel between Russia and Ukraine and broker confidence-building measures and an eventual peace agreement.³⁵ The following year, Brazil's Lula pitched to Ukrainian President Volodymyr Zelensky and Putin a similar plan to assemble a "peace club" of neutral nations that could mediate a political resolution.³⁶ Indonesian President Joko Widodo, known as Jokowi, visited Kyiv and then Moscow in 2022, urging Zelensky and Putin to start a dialogue.³⁷ In 2023, Indonesia's then defense minister and current president-elect, Prabowo Subianto, put forth a plan that featured a ceasefire, a demilitarized zone between front lines at the time, and UN referendums in "disputed territories."³⁸ Also in 2023, South Africa led a peace mission of African leaders to visit Putin and Zelensky; they proposed a ten-point plan of confidence-building measures. This was the first time that African leaders set out on a peace mission beyond their continent.³⁹

These peace initiatives have exposed the sometimes sharp differences between the emerging powers and the United States on what a postwar settlement may look like. For example, Lula suggested that Ukraine may have to let go of Crimea,⁴⁰ and South Africa's Ramaphosa said that "both sides" would need to have security guarantees, which some U.S. officials have interpreted as Ukraine giving up on NATO membership⁴¹—an idea that is anathema to Washington. Nonetheless, these initiatives have showed that some of the emerging powers aspire for a greater role on the world stage and want to tackle difficult diplomatic challenges, even in faraway conflicts.

POSITIONS ON U.S.-CHINA COMPETITION

When it comes to competition between the United States and China, all ten emerging powers, except India, have remained adamantly nonaligned. None wants to view its partnerships with the two great powers as mutually exclusive or be pulled too closely to either. Their leaders often express concern about the intensifying rivalry and hostility between the two powers, and they oppose any slide toward a new cold war. “We refuse to be a pawn in a new cold war,” Indonesia’s Jokowi said before hosting the 2023 G20 Summit in Bali.⁴² “I am not going to get into a cold war with anyone,” Brazil’s Lula said in February 2023.⁴³

Although there are important differences among them, the emerging powers generally see China’s rise as an opportunity as well as a threat. Most want to deepen their economic and political ties to China and the United States. They participate in U.S.-led and China-led multilateral organizations alike. Even India and Indonesia, which have clear security concerns about China due to ongoing territorial disputes, have not fully backed U.S. defense strategies to counter Beijing.

Table 2 shows the emerging powers’ alignment on U.S.-China competition across indicative measures; India is most closely aligned with the United States (indicated by an entirely green row).

***None wants to view its partnerships
with the two great powers as
mutually exclusive.***

Table 2. Emerging Powers' Positions on U.S.-China Competition

Country	Conducted more trade with China or the U.S. in 2022 ^a	Received more investment from China or the U.S. ^b	Using or planning to use Huawei equipment in 5G networks	Received more arms from China or the U.S. (2018-2022) ^c	Conducts regular security cooperation (arms sales and training) with China	Conducts regular security cooperation (arms sales and training) with the U.S.
Thailand	China	United States	Yes	China	Yes	Yes
Nigeria	China	United States	Yes	China	Yes	Yes
Indonesia	China	China	Yes	United States	Yes	Yes
South Africa	China	United States	Yes	N/A	Yes	Yes
Türkiye	China	United States	Yes	United States	No	Yes
Saudi Arabia	China	United States	Yes	United States	No	Yes
Argentina	China	United States	Yes	United States	No	Yes
Brazil	China	United States	Yes	United States	No	Yes
Mexico	United States	United States	Yes, with restrictions	United States	No	Yes
India	United States	United States	No	United States	No	Yes

a UN Comtrade Database, <https://comtradeplus.un.org/>.

b Determination based on China's and the United States' shares of the country's total inward foreign direct investment (FDI) stock in 2022. For U.S. FDI, see Bureau of Economic Analysis, <https://www.bea.gov/international/di1usdbal>. For Chinese FDI, see Chinese Ministry of Commerce, "Statistical Bulletin of China's Outward FDI," 2022, <http://images.mofcom.gov.cn/fec/202310/20231030091915777.pdf>.

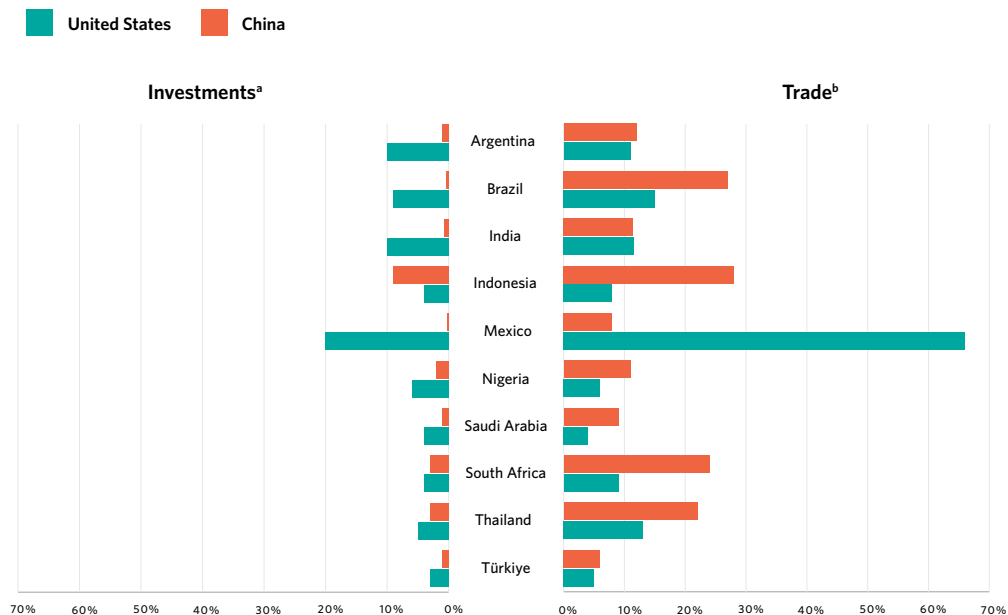
c Stockholm International Peace Research Institute, "SIPRI Arms Transfers Database," <https://www.sipri.org/databases/armstransfers>.

STRONG ECONOMIC TIES WITH CHINA

All the emerging powers have strong economic ties with China. Figure 7 illustrates their economic relationships with it and the United States. China makes up a larger share of their total trade in goods, except for India and Mexico. The United States, however, has a much larger share of total inward foreign direct investment (FDI) stocks for nine of them, reflecting the fact that it has been investing overseas and accumulating FDI stock for much longer than China.⁴⁴

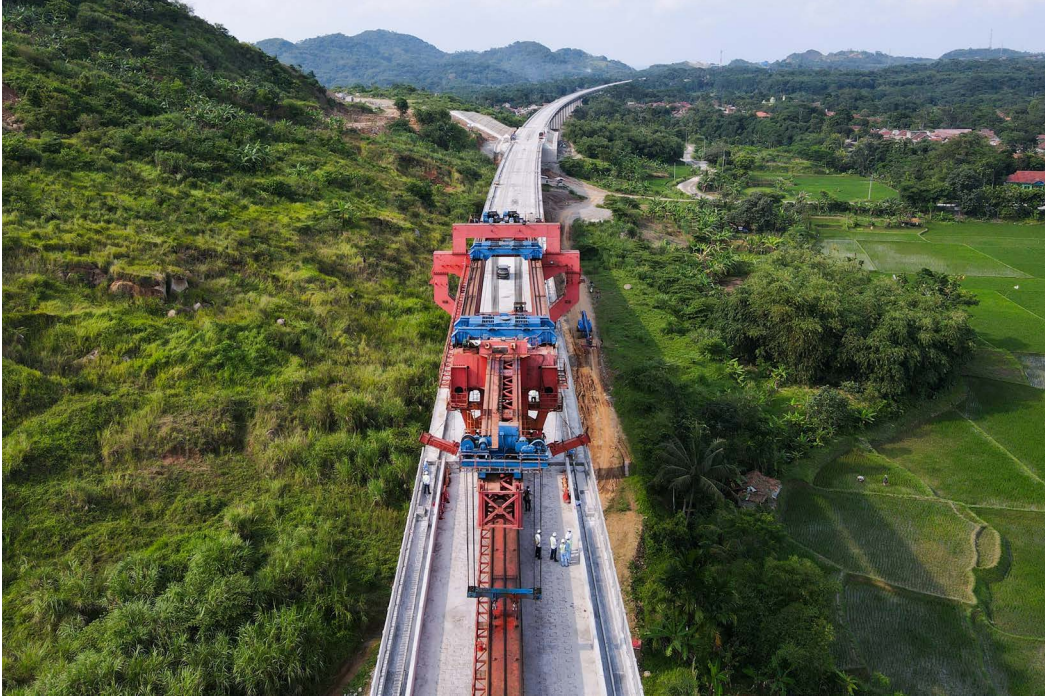
Eight of these countries trade more with China than with the United States.⁴⁵ China is the top trade partner for Brazil, Indonesia, Nigeria, Saudi Arabia, South Africa, and Thailand. Indonesia and Thailand access the Chinese market through the Regional Comprehensive Economic Partnership and the China-ASEAN Free Trade Agreement. Some countries have trade relationships with China that are concentrated on specific goods. For example, Brazil

Figure 7. Emerging Powers' Economic Relationships With China and the United States



a Calculations based on China's and the United States' shares of each country's total inward foreign direct investment (FDI) in 2022. For U.S. FDI, see Bureau of Economic Analysis <https://www.bea.gov/international/dilusdbal>. For Chinese FDI, see Chinese Ministry of Commerce, "Statistical Bulletin of China's Outward FDI, 2022," <http://images.mofcom.gov.cn/fec/202310/20231030091915777.pdf>.

b Calculations based on China's and the United States' shares of each country's total trade in goods in 2022. Saudi Arabia's trade data is from 2021. Source: UN Comtrade Database, <https://comtradeplus.un.org/TradeFlow>.



The Jakarta-Bandung High-Speed Railway in Indonesia, part of which is seen in this photo taken on October 16, 2022, was funded through China's Belt and Road Initiative. (Photo by Xu Qin/Xinhua via Getty Images)

sells the majority of its top agricultural products, including soybeans and beef, to China. China is also the top buyer of Saudi Arabia's crude oil. It relies on Indonesia for much of its minerals and metals, including coal, iron, and steel. There is a degree of codependence to these trade relationships because China also relies on these countries as markets for its exports.

The emerging powers receive high levels of investment from China, especially for large-scale infrastructure projects, and seven are members of its Belt and Road Initiative (BRI). They have accepted Chinese funding for railways, airports, power plants, information and communications technology, and other projects. Notable among these are high-speed rail lines in Indonesia, Nigeria, and Thailand; the \$8 billion Atucha III Nuclear Power Plant in Argentina; and the Lekki Deep Sea Port in Lagos, Nigeria.⁴⁶ In most of these cases, the recipient country has taken on sovereign debt from China. Indonesia is the exception because it has had state-owned enterprises take on the debt themselves.⁴⁷

Argentina, Indonesia, Nigeria, Thailand, and Saudi Arabia have been especially eager for Chinese capital. India and Mexico have been more cautious; they have not signed on to the BRI and do not receive high levels of Chinese capital.⁴⁸ Brazil is also not a member

of the BRI, but it has taken large amounts of investment from China and recently signed more than a dozen agreements with it, many of which involve infrastructure and investment.⁴⁹ China has reduced its overseas lending significantly since 2020, but it is not going to abandon the BRI. It is instead refashioning it to include less high-profile and less capital-intensive projects.⁵⁰

The emerging powers also attract considerable investment from the United States. In fact, as figure 6 shows, U.S. investment in all but one of them surpasses China's. The United States still has important trade relationships with these countries (although China's are even stronger). Mexico has a free trade agreement with the United States. Nigeria and South Africa receive preferential trade benefits through the U.S. African Growth and Opportunity Act. And India, Indonesia, and Thailand are part of the U.S.-led Indo-Pacific Economic Framework negotiations.

SECURITY TIES WITH THE UNITED STATES AND CHINA

The emerging powers have far more robust security ties with the United States and Europe than with China. Washington has strong defense ties with its treaty allies—Thailand and Türkiye—as well as with India, Indonesia, and Saudi Arabia. These range from weapons sales, training, and joint exercises to, in the case of India, intelligence sharing and cooperation on critical technologies. Saudi Arabia and Türkiye host U.S. military forces. Nigeria also receives counterterrorism training and security assistance from the United States.

These countries have increasing military ties with China, too. Its appeal as an exporter of cheaper arms that does not impose conditionality on its sales has been growing. Many countries in the developing world, especially those with poor human rights records that complicate their eligibility to purchase Western arms, see Chinese arms as more affordable and coming with fewer strings attached, even when these arms are less advanced.⁵¹ For example, Nigeria and Thailand receive security assistance from the United States but they purchase significant stocks of weapons from China, in large part because of past difficulties in obtaining U.S. weapons due to concerns about their human rights records.⁵² Even Saudi Arabia, which is the United States' top weapons customer and imports nearly 80 percent of its weapons from the country, has begun exploring options for the purchase of advanced weapons such as drones, medium-range missiles, and air defense systems from China.⁵³ The war in Ukraine may also be aiding China's rise in the lower-tech "value arms" market, as Western sanctions are making it more difficult for Russia to sell such weapons and China seeks to supplant it.⁵⁴

EMBRACING BOTH U.S.- AND CHINA-LED INSTITUTIONS

The ten emerging powers are members of the U.S.-led international institutions that emerged after World War II, but they have also favorably greeted China-led forums and institutions created in recent years (see table 3). Membership in the latter does not necessarily signal their alignment with China—after all, several NATO members also joined the Beijing-led Asian Infrastructure Investment Bank, for instance. The emerging powers join such organizations for a variety of reasons, and the cost of doing so is low. However, their interest in these organizations signals their openness to an international order that, in their view, would be less dominated by the West and more multipolar. They are not interested in an order dominated by China, but they value the organizations it has created for their potential to bring about a more fluid, multipolar system that would replace a U.S.-dominated one that they believe has too often denied them full sovereignty or put them at a disadvantage.

Table 3. The Emerging Powers' Memberships in China-Led International Institutions⁵⁵

	Asian Infrastructure Development Bank	Belt and Road Initiative	BRICS	Shanghai Cooperation Organization
Saudi Arabia	✓	✓	✓	✓
India	✓	✗	✓	✓
South Africa	✓	✓	✓	✗
Thailand	✓	✓	✗	✗
Türkiye	✓	✓	✗	✓
Indonesia	✓	✓	✗	✗
Brazil	✓	✗	✓	✗
Nigeria	✓	✓	✗	✗
Argentina	✓	✓	✗	✗
Mexico	✗	✗	✗	✗

Alongside China and Russia, Brazil, India, and South Africa are members of the BRICS, which is sometimes seen in Washington as a geopolitical rival to the G7. At its August 2023 summit, the group invited Argentina and Saudi Arabia to become members. Saudi Arabia has done so, but Argentina withdrew its application after Milei became president.⁵⁶ Indonesia and Türkiye have expressed interest in joining the BRICS, but the former ultimately decided against it at the summit, citing the need to consult with its partners in the Association of Southeast Asian Nations.⁵⁷

The emerging powers have also expressed interest in joining the New Development Bank, which is linked to the BRICS and China promotes as a non-Western alternative to the International Monetary Fund and the World Bank. For example, Argentina sought to join the bank after receiving several bailouts from Western financial institutions over the past decade.⁵⁸

Three of the emerging powers have formal relationships with the Shanghai Cooperation Organization (SCO), which was established by China in 2001 in partnership with Russia and several Central Asian states. The SCO is not taken seriously by many in the West, and it is hardly the alternative to NATO that Russia once seemed to want it to be. But it is a forum for security dialogue in which its members see value. Even India, which the United States considers a vital partner in its rivalry with China, is a member and views the SCO as a means of furthering counterterrorism cooperation with China and generally keeping security dialogue with it intact. Türkiye is a dialogue member despite also being a NATO member, and Erdoğan has floated the possibility of seeking full membership.⁵⁹ Saudi Arabia also recently joined the SCO as a dialogue member.⁶⁰

The emerging powers' openness to China's alternative organizations is also mirrored sometimes in their rhetoric about the U.S.-led order. Brazil's Lula, for example, has criticized the predominance of the U.S. dollar in the international monetary system, saying "every night I ask myself why every country needs to trade in the dollar."⁶¹ He has endorsed China's supposed aim of reducing the dollar's dominance in the world economy.⁶² Not all of the emerging powers sympathize with this view, however, as the election of the pro-dollar Milei in Argentina indicates.

SECURITY CONCERNS ABOUT CHINA

Even as they strengthen their ties with China, some of the ten emerging powers have security concerns about it—especially those in Asia, where Beijing has used economic, military, and quasi-military pressure to advance its interests with increasing aggressiveness. India, Indonesia, and Thailand all face some security risk from China, although Thailand has been far less concerned about it than the other two.

India sees China as a major threat, as the countries have been embroiled in a long-standing territorial dispute over their 2,100-mile border.⁶³ Although their militaries have established buffer zones since a clash in 2020, a deadly conflict remains a possibility.⁶⁴ Indonesia clashes with China over the Natuna Islands and surrounding waters in the South China Sea, which

Beijing has threatened by asserting maritime rights and sending fishing boats into Jakarta's exclusive economic zone.⁶⁵

Neither New Delhi nor Jakarta has any intention of contributing militarily to U.S. operations in the event of a crisis over Taiwan.

Both India and Indonesia engage in security cooperation with the United States, albeit to different degrees, to improve their readiness for a conflict with China. Indonesia participates with U.S. forces in major air, land, and sea exercises, and the

two militaries agreed in 2022 to improve interoperability.⁶⁶ India's security cooperation with the United States has deepened in recent years. The two countries share intelligence, hold a regular two-plus-two dialogue on defense issues, and carry out military-to-military exercises and training. India has also become more enthusiastic about the Quadrilateral Security Dialogue (Quad) it belongs to alongside Australia, Japan, and the United States, and it has agreed to coproduce strategic technology with the United States through the Initiative on Critical and Emerging Technology.⁶⁷

None of this means that India or Indonesia would join a U.S.-led military coalition against China, however. New Delhi has resisted operational integration with the U.S. military, worrying that such integration could undercut its sovereignty.⁶⁸ Neither New Delhi nor Jakarta has any intention of contributing militarily to U.S. operations in the event of a crisis over Taiwan.⁶⁹ Indonesia also worries that the U.S. approach to China is generating an arms race in Asia, and it has been especially critical of the AUKUS Trilateral Security Partnership between Australia, the United Kingdom, and the United States, which it worries will unnecessarily provoke Beijing and upset the regional military balance.⁷⁰

VARYING POSITIONS ON TAIWAN

When it comes to Taiwan, the ten emerging powers adhere to a "one China" policy and hold positions that resemble the traditional U.S. position.⁷¹ They maintain economic and unofficial diplomatic relations with Taiwan but avoid any moves that Beijing could view as provocative. This approach is not unlike that of major U.S. allies such as Australia, Japan, and South Korea, each of which would also be out of sync with Washington if it moved toward supporting Taiwan's independence or made explicit its commitment to defend Taiwan in an invasion.⁷² Compared to the other countries, Argentina leans more toward Beijing

on Taiwan, on account of its own territorial dispute with the United Kingdom over the Malvinas/Falkland Islands, where it uses the same argument of “territorial integrity” that Beijing uses with respect to Taiwan.⁷³

The question is how far the emerging powers would go to support Washington if the United States were to back Taiwan with military force to repel a Chinese attack. None of the three Indo-Pacific countries—Indonesia, India, and Thailand—would throw their support behind the United States in a war over Taiwan: Indonesia has explicitly stated that it would remain neutral in such a war.⁷⁴ Even as its relations with China have worsened, India would probably not do much to provide direct support to U.S. operations against China in the event of a conflict.⁷⁵ Thailand, despite being a U.S. treaty ally and having allowed Washington basing access in the past, is likely to stay out of a Taiwan conflict.⁷⁶ It is hard to imagine Saudi Arabia providing any significant support given its deepening energy relationship with China—although some U.S. policymakers hope that it might threaten to slow or cut off oil exports in such an event. For many of the emerging powers, whether Beijing is viewed as a clear aggressor in such a war would matter a great deal in how far they would be willing to go to support the United States in aiding Taiwan. Brazil, Nigeria, South Africa, and Türkiye would almost certainly provide no material support in either case—largely because they have little to offer.

Overall, even as the ten emerging powers rely on American investment and seek to strengthen security arrangements that reinforce their ties to the United States, they have largely avoided siding with it on questions of great power competition. The next chapter analyzes the root causes of their positions, assessing the extent to which their positions are grounded in economic, domestic, geographic, and other considerations.

WHAT MOTIVATES THE EMERGING POWERS


Much existing thinking about the ten emerging powers' various alignments with China and Russia emphasizes the influence of economic interests. Economic interests do play an important role in shaping their desire to have positive relations with China and, in many cases, with Russia, but they are not the only factor that matters. The emerging powers' views of what constitutes a just international order, their geographies, their defense relationships, and, in some cases, their domestic politics also play a role. Chinese and Russian propaganda and disinformation also have some influence on them, although this should not be exaggerated. One factor that does not appear to drive the emerging powers is a concern about the state of democracy and human rights in other countries. Tables 4 and 5 summarize the analysis that follows.


ECONOMIC INTERESTS


Economic interests play a key role in shaping the ten emerging powers' positions on China and Russia. As developing countries, they are less able to absorb the economic costs of international conflict. For many, their economies have been more vulnerable to the inflationary shock to food prices that the war in Ukraine caused. In addition, they see important future gains from economic cooperation with China and Russia, especially where that promises

Table 4. Factors Driving Emerging Powers Away From Alignment With the United States on Russia

	Argentina	Brazil	India	Indonesia	Mexico	Nigeria	Saudi Arabia	South Africa	Thailand	Türkiye
Economic Interests ^a	Red	Red	Red	Red	White	Red	Red	Red	Red	Red
Views of International Order ^b	Yellow	Red	Red	Red	Yellow	Yellow	Yellow	Red	Yellow	Yellow
Domestic Politics ^c	White	Red	Yellow	Yellow	Red	Yellow	White	Red	White	Red
Defense Relations ^d	White	White	Red	Red	White	Yellow	White	White	White	Red
Russia's Propaganda ^e	White	White	Yellow	Yellow	Yellow	Yellow	White	Yellow	White	Yellow
Geography ^f	White	White	White	White	White	White	White	White	White	Red
Desire to Support Democracy and Human Rights ^g	White	White	White	White	White	White	White	White	White	White

 **Factor significantly influences the country's position and drives it away from the U.S. position**

 **Factor moderately influences the country's position and drives it away from the U.S. position**

 **Factor significantly influences the country's position and drives it closer to the U.S. position**

 **Factor has little to no impact on the country's position**

a Economic Interests: A country's economic ties with Russia, or the economic consequences it faces from the war, drive it to take a certain position on Ukraine.

b Views of International Order: A country's view of how international order should be maintained clashes with that of the United States and its Western allies; that difference in views guides the country's approach to the war in Ukraine.

c Domestic Politics: Populist leadership and/or anti-colonial sentiment motivates a country to take a certain position on the war in Ukraine.

d Defense Relations: A country's defense relations with Russia influence its position on Ukraine.

e Russia's Propaganda: Russia's propaganda efforts motivate a country to take a certain position on the war in Ukraine.

f Geography: Interests that derive from the basic facts of geography shape a country's position on the war in Ukraine.

g Desire to Support Democracy and Human Rights: A country's support for democracy and human rights influences its position on the war in Ukraine.

Source: Authors' assessments based on case studies and interviews with diplomats and U.S. officials.

Table 5. Factors Driving Emerging Powers Away From Alignment With the United States on China

	Argentina	Brazil	India	Indonesia	Mexico	Nigeria	Saudi Arabia	South Africa	Thailand	Türkiye
Economic Interests ^a	Red	Red	White	Red	Teal	Red	Red	Red	Red	Yellow
Views of International Order ^b	Yellow	Red	Red	Red	White	Yellow	Red	Red	Yellow	Red
Domestic Politics ^c	White	Red	Yellow	Yellow	Yellow	Yellow	White	Red	White	Yellow
Defense Relations ^d	White	White	Teal	White	White	Yellow	Teal	White	Yellow	Teal
China's Propaganda ^e	White	White	White	Yellow	White	Yellow	White	Yellow	Yellow	White
Geography ^f	White	White	Teal	Yellow	Teal	White	White	White	Red	White
Desire to Support Democracy and Human Rights ^g	White	White	White	White	White	White	White	White	White	White

- **Factor significantly influences the country's position and drives it away from the U.S. position**
- **Factor moderately influences the country's position and drives it away from the U.S. position**
- **Factor significantly influences the country's position and drives it closer to the U.S. position**
- Factor has little to no impact on the country's position**

- a Economic Interests: A country's economic ties with China drive it to take a certain position toward Beijing.
- b Views of International Order: A country's view of how international order should be maintained clashes with that of the United States and its Western allies; that difference in views guides the country's approach to U.S.-China competition.
- c Geography: Interests that derive from the basic facts of geography shape a country's position on U.S.-China competition.
- d Domestic Politics: Populist leadership and/or anti-colonial sentiment motivates a country to take a certain position on China.
- e Defense Relations: A country's defense relations with China and/or the U.S. shape its position on U.S.-China competition.
- f China's Propaganda: China's propaganda efforts motivate a country to take a certain position toward Beijing.
- g Desire to Support Democracy and Human Rights: A country's support for democracy and human rights influences its position on China.

Source: Authors' assessments based on case studies and interviews with diplomats and U.S. officials.

investment or technology. They also derive a large share of their GDP from exports, which can make them highly vulnerable to external economic disruptions. For example, Brazil's agricultural and food sector generates about one-third of its GDP, and Nigeria and Saudi Arabia are heavily dependent on oil exports.⁷⁷ Their capacity to absorb shocks, such as the one that Europe underwent to end its reliance on Russian energy, is more limited than that of the developed economies of Asia and the West. All of this makes them disinclined to sacrifice economic ties with Russia or China.

Economic Relations With Russia

When it came to Ukraine, economic interests were key factors that encouraged Brazil, India, Türkiye, and Saudi Arabia to preserve ties to Russia. Some of the emerging powers were driven by the desire to maintain a specific economic relationship. Others were driven by a general concern about the economic impact of the war. And some were driven by economic opportunities created by the sanctions regime on Russia.

Because their economies are more fragile than, say, those of the G7 countries and are very much tied to the global economy, the emerging powers have less ability to absorb the economic effects of the war. They have faced disproportionate economic consequences, including high energy prices, food scarcity, and inflation.⁷⁸

Brazil's reliance on Russia for one-quarter of its fertilizer imports appears to have been a key factor that dissuaded it from backing the West's anti-Russia coalition.⁷⁹ If Russia were to cut these exports, it would damage Brazil's agricultural output and harm its economy.⁸⁰ Nigeria, Thailand, and Indonesia are heavily reliant on Russia and Ukraine for fertilizer and wheat and desperately want the war to end so that supply chains can be restored.⁸¹ Shipments of Russian wheat to Nigeria have dwindled to almost nothing as a consequence of the war, prompting a food security crisis.⁸² In Indonesia, the war led to shortages of Indomie instant noodles, raising the price of an affordable staple. When Jokowi visited Kyiv and Moscow in June 2022, Indonesians called it an "Indomie mission"—a clear indication of how important food supply chain disruptions were to their country.⁸³

A few of their leaders blamed Western sanctions as much as they blamed Russia's invasion for this situation. South Africa's Ramaphosa, for example, warned in May 2022 that sanctions would lead "bystander" countries that are "not part of the conflict" to suffer.⁸⁴ Indeed, the global economic damage of the war is in part a consequence of Russia's threat to Ukraine's grain exports, but Western sanctions have played a part in intensifying the damage for many countries.⁸⁵ Most of the emerging powers have seen their neighbors sanctioned by the United States. (Türkiye itself has been sanctioned.) And they oppose such extraterritoriality, seeing the sanctions as a coercive violation of national sovereignty. Their decision not to join the sanctions regime on Russia is consistent with their long-standing opposition to sanctions in general, which is tied to their critiques of the structure of the current global order.⁸⁶

The sanctions regime created economic opportunities for some of the emerging powers that they did not want to miss. For example, India's low per capita GDP and enormous demand for energy made it difficult to say no to the cheap energy Russia offered. As Foreign Minister Subrahmanyam Jaishankar put it, wealthy European countries were able to wean themselves from Russian oil imports in a way that was "comfortable," but "I have a population at \$2,000 [per capita annual income]. I also need energy, and I am not in a position to pay high prices for oil."⁸⁷ Saudi Arabia similarly capitalized on the war by coordinating oil production cuts with OPEC+ and raking in extra profits.⁸⁸ Türkiye's initial increase in illicit exports to Russia can be put in the same category—even though Ankara eventually tightened up controls.

Economic Relations With China

Economic interests loom no less large in the ten emerging powers' approaches to China, which uses its robust economic ties to increase its bargaining power with them as it does with other countries around the world.⁸⁹

Economic ties are a key factor in the embrace of China by eight of these countries. In Argentina, Brazil, Indonesia, Nigeria, Saudi Arabia, South Africa, Thailand, and Türkiye, China has funded high-speed railways, seaports, 5G networks, nickel plants, renewable energy infrastructure, nuclear power plants, and more, mostly through the BRI. The economic and technological benefits they gain from China can make them hesitant to do anything that might antagonize Beijing, lest they lose out on future loans, investment, and trade. The United States has sought to draw attention to the problems that some countries have encountered with BRI financing, but this cannot counteract the benefits that emerging powers gain from it.⁹⁰ China's claim that BRI-related growth has lifted 42 million people out of poverty is dubious, but it is clear that the initiative has expanded trade and connectivity, generated jobs, and enhanced development in most recipient countries.⁹¹

Economic ties have created pro-China constituencies in the emerging powers that are able to pressure the government to maintain positive relations with Beijing. For example, Brazil's agribusiness caucus pressures its government to deepen relations with China, its top importer.⁹² Such lobbies can constrain the range of action governments can take toward China without sacrificing domestic political support.

China also wields economic power through coercive measures, such as by threatening economic costs for nations that challenge its interests.⁹³ The potential for such measures provides influence with the emerging powers, even though

Economic ties have created pro-China constituencies in the emerging powers that are able to pressure the government to maintain positive relations with Beijing.

economic coercion can sometimes backfire.⁹⁴ Most of the emerging powers have robust economic ties with the United States and thus seek a middle ground between the two powers. As discussed above, most of them receive more U.S. than Chinese investment but trade more with China than the United States. This makes them inclined to balance between the two powers and avoid situations in which they would have to make a choice.

VIEWS OF INTERNATIONAL ORDER

For most of the ten emerging powers, economic interests converge with other motives in shaping their degree of alignment with China and Russia. One of the more important is their views of international order, which make them hesitant to isolate and exclude Russia from international forums and broadly supportive of China's critiques of the existing world order and its U.S.-led institutions.

When Russia invaded Ukraine, most Western countries saw this as the most brazen violation of international rules since World War II. U.S. President Joe Biden said that the war was part of "a battle between democracy and autocracy, between liberty and repression, between a rules-based order and one governed by brute force."⁹⁵ In his view, the international community had to support Ukraine in order to uphold the norms and laws that prohibit the use of force to change international borders.

The emerging powers, however, are skeptical that the United States is really concerned about the future of the rules-based international order, especially in light of the 2003 U.S. invasion of Iraq and recent support for Israel's bombing of Gaza. They view the war in Ukraine as springing from a decades-long NATO-Russia standoff over power in Europe, rather than a struggle over the principles of world order.⁹⁶ They are thus inclined to resist U.S. demands that they sacrifice economic and political ties with China and Russia in defense of the current world order.⁹⁷

In their view, a functioning international order would provide an institutional structure for working out conflicts without violence, including between warring states.⁹⁸ To be sure, they do not have detailed plans for what the various components of a reformed international order ought to be, but they do have general views about what it should look like and have embraced some specific ideas for reform. They share qualms about the post-1945 international order, which they view as unfairly dominated by the former colonial powers in the West, and the United States in particular. Since Russia invaded Ukraine, for example, they have disliked the resurgence of the G7—which U.S. National Security Advisor Jake Sullivan has called the "steering committee of the free world"—because it seems to imply that the United States believes world affairs should be run primarily by a few wealthy Western economies, many of which were once colonial powers.⁹⁹

These countries thus want to see greater equality on the UN Security Council, through the addition of more permanent members and an end to veto power, which they see as ineffective and undemocratic.¹⁰⁰ They have long championed its enlargement, with Brazil and India aspiring for permanent seats and several countries calling for a permanent African representative.¹⁰¹ Historically, the United States has opposed enlargement of the Security Council, but the Biden administration has made an effort to build momentum behind the addition of at least six new permanent members.¹⁰² These countries also advocate reforms of the Bretton Woods institutions, including a redivision of the International Monetary Fund's quotas so that voting power is proportionate to each country's relative economic weight.¹⁰³ Brazil says that a lack of reform in these financial institutions is driving the developing world toward China-led institutions such as the Asian Infrastructure Investment Bank and the New Development Bank.¹⁰⁴

The emerging powers also object to what they see as the uneven application of the rules and norms of the system. They criticize, for example, the way in which sovereignty—a core principle of the UN Charter—has been violated by the United States and thus view Western entreaties to support Ukraine as hypocritical.¹⁰⁵

Similarly, they view the unilateral use of sanctions as violations of sovereignty that are inconsistent with the spirit of the existing order. U.S. third-party sanctions that do not have UN backing are particularly problematic for them.¹⁰⁶ They take Washington's claims that it uses these tools to promote values such as human rights and democracy as justifications for its raw application of power.

The desire to change the system of global governance also influences their approaches to China. Part of what drives many developing countries toward the BRICS and the New Development Bank is the prospect of building up alternatives to older forums and institutions of the U.S.-led international order. Many of the emerging powers are positive about the rise of China if it results in a shake-up of this order, dilutes the institutional power of the United States and the West, and elevates their role on the world stage. This explains a statement by Brazil's Lula in 2023 that he and Chinese President Xi Jinping were working together to “balance world geopolitics,” as well as former Argentine president Alberto Fernández's call in 2022 for the construction of a “new international financial architecture” that accounts for developing countries' interests.¹⁰⁷

The emerging powers nonetheless appreciate the importance of international law and existing multilateral institutions, given their weakness relative to the world's major powers. For

Many of the emerging powers are positive about the rise of China if it results in a shake-up of this order, dilutes the institutional power of the United States and the West, and elevates their role on the world stage.

many of them, a history of colonial rule or subjugation to foreign powers leads to embracing the UN Charter's principles of sovereignty and territorial integrity as well as opposing the use of force.¹⁰⁸ Even if economic interests are as or more influential on their positions, these alternative visions of a just world are a meaningful factor behind their differences with the West, particularly on the question of Ukraine.

GEOGRAPHY

Geography plays a key role in shaping the positions of the ten emerging powers, in large part because of its impact on their security interests and economic flows but also because it affects historical attitudes and other influences. Geography's impact will be difficult for emerging powers to overcome. Proximity to a great power in particular creates various interests and vulnerabilities. Being near China, Russia, or the United States tends to make emerging powers adjust their policies to shield themselves from the actions of these great powers and avoid punitive measures.

Türkiye is the only country among the emerging powers to be in close proximity to the war in Ukraine. Ankara thus has an interest in helping Ukraine fight back against Russia's onslaught, but its proximity also obliges it to keep diplomatic channels open with Russia.¹⁰⁹ Due to this proximity, Türkiye and Russia also have a historical relationship dating back centuries. The Ottoman Empire was initially the dominant power in the region, but Russia encroached on and eventually absorbed large amounts of its territory during the eighteenth century. These realities have encouraged Türkiye's middle-of-the-road stance on the war. Ankara has sought to play a leading role in negotiations between Russia and the West, for example, on the Black Sea Grain Initiative.

Geography helps explain why Indonesia and Thailand make efforts to maintain good relations with China despite their different interests, whereas Mexico has been less concerned about doing so. For India, on one level, geography pushes New Delhi toward Washington as its border dispute with Beijing is a real source of tension and it sees itself as China's major regional competitor. At the same time, however, proximity also makes India much more exposed to retaliation from China than U.S. partners in other regions, which restrains it from throwing its whole weight behind U.S. military plans for the region, including when it comes to Taiwan.¹¹⁰ India's leaders are suspicious of China and view the countries' relationship as highly competitive, but they also are not keen for open conflict in the region, let alone on their border.¹¹¹

Similarly, Indonesia's sprawling archipelagic geography in Southeast Asia and close proximity to China makes it especially wary about U.S.-China competition and the militarization of the Indo-Pacific.¹¹² This, together with a troubled history with Australia, is the root of

its hesitation about the United States' plan to provide Australia with nuclear submarines under the AUKUS agreement.¹¹³ Even though Indonesia has an ongoing territorial dispute with China in the South China Sea, it does not want the United States to get involved.¹¹⁴ Its position on U.S.-China competition is also informed by its history as a leader of the nonaligned movement during the Cold War. Thailand, for its part, has no territorial disputes with China, but its embrace of Chinese weapons and security cooperation is shaped by proximity as well.¹¹⁵

Geography makes Mexico less likely to embrace China. It has a nearly 2,000-mile border with the United States, with which it cooperates on the cross-border movement of people and goods and which is its top trading partner.¹¹⁶ If Mexico were to significantly elevate its relationship with China, the United States would almost certainly retaliate.

DEFENSE RELATIONS

Existing and potential future weapons sales are an important factor shaping the positions of some of the ten emerging powers toward China and Russia. Costs, path dependency, and a desire to avoid dependence on Western arms all play a role in this.

Even though its military ties with the United States have deepened in recent years, India has not ended its long-standing defense relationship with Russia and likely will not anytime soon.¹¹⁷ Russian weapons systems are cheaper than U.S. systems, and those that India already has are not easily replaced by U.S. arms. Moreover, New Delhi is not keen to develop a dependence on U.S. weapons, even as it seeks to benefit from closer defense cooperation with the country.¹¹⁸ The desire to balance against not just China but also the United States will likely factor in India's future procurement plans.

Türkiye acquired Russia's advanced S-400 missile defense system before the invasion of Ukraine, thus linking a key part of its national defense closely to the Russian military. After the acquisition, the United States sanctioned Türkiye and removed it from the F-35 joint strike fighter program. Washington has told Ankara it can rejoin the F-35 "family" if it gives up the S-400 system, but Ankara seems set on retaining it.¹¹⁹ If Türkiye keeps the system, operating it will require sustained cooperation with the Russian military.¹²⁰ As a NATO member, Türkiye is far more dependent on the West for its military equipment, but its acquisition of the S-400 is one consideration that makes it inclined to ensure friendly relations with Russia.

Nigeria has been purchasing more weapons from China, in part due to U.S. restrictions on weapons sales to states that do not meet certain human rights standards.¹²¹ Even if it prefers the more technologically advanced American weapons, Nigeria may see China as an easier source because it does place any human rights conditions.¹²² It has recently sought Beijing's

help to fight a domestic insurgency, and it has signaled its interest in intelligence sharing, technology transfers, and joint training.¹²³ The two countries have also announced plans to establish a Chinese military equipment firm in Nigeria. These defense ties likely shape Nigeria's policy calculations and make the country unlikely to side with the United States against China.

Arms sales are less important in explaining emerging powers' ties to China than they are in explaining their ties to Russia, a reflection of the fact that the former is a newer player in this global market.

But weapons sales and defense relations do not appear to be important in other cases. Brazil's positions on China and Russia cannot be explained by defense ties. It is the leading military power in Latin America and has long invested in its defense industry, prioritizing ties to European producers such as France and Sweden.¹²⁴ Indonesia

has preserved friendly relations with Russia even as it has moved away from relying on its military equipment, dropping a plan to procure the Russian Su-35 fighter aircraft and turning instead to France for the Rafale.¹²⁵ It increasingly imports military supplies from the United States, South Korea, and Europe.¹²⁶

In general, arms sales are less important in explaining emerging powers' ties to China than they are in explaining their ties to Russia, a reflection of the fact that the former is a newer player in this global market. This could change if the desirability of Russian arms continues to decline and China remains a viable alternative to U.S. weapons for some nations.¹²⁷

DOMESTIC POLITICS

As with many countries, domestic politics often plays a role in shaping the positions the emerging powers take in their foreign policies. The effects are naturally greatest for countries with democratic regimes, where the effects of populism, anti-colonialism, anti-Americanism, and nationalism all shape rhetoric and decisionmaking.

Populist politics, for example, has shaped Mexico's and Brazil's approaches to Russia. Mexico's López Obrador's criticisms of U.S. policy on the Ukraine war were at least in part an expedient way for him to boost domestic support by vocally asserting Mexico's sovereignty and independence from America. He has long used criticism of the United States to play to a domestic elite audience that can be deeply skeptical of American motives and values (even if most Mexicans have favorable opinion on the United States).¹²⁸ Lula's embrace of China and Russia is also a means of projecting Brazil's independence from the United States for a domestic audience and appeasing powerful, pro-China interest groups.¹²⁹ A



Brazilian President Lula da Silva (then a presidential candidate) waves to a crowd at a campaign rally on October 9, 2022. (Photo by DOUGLAS MAGNO/AFP via Getty Images)

change in government might yield a somewhat different tone, but the nativist and anti-American currents on which Lula and López Obrador are playing are real in both countries.

Domestic political dynamics in the emerging powers do not always play against the United States. None of these nations are eager to be subservient to China: just as nationalism and a desire for sovereignty leads them to resist America's dominance, it will also lead them to resist China's. Moreover, this will likely be more the case as China's power grows—this may explain why, despite Lula's embrace of China, many Brazilians are worried that Brazil could drift too far into China's orbit.¹³⁰

For now, however, most of these countries' leaders are likely to get more political benefits out of poking Washington rather than Beijing. Many of the emerging powers have strong memories of colonialism that affect their politics and thinking about the foreign policy of the United States and its European allies, some of which engaged in some of the most egregious sins of the colonial era. Anti-colonial sentiment may be less salient today, but it remains part of the political culture of many of the emerging powers. China stands to benefit from this because it was also dominated by European colonial powers in the nineteenth century and thus has an understanding of how colonialism continues to affect the emerg-

ing powers' worldviews. Meanwhile, Russia continues to benefit from the legacies of Soviet anti-imperialist propaganda. The colonial past also brings race into the equation, and China may be able to play on racial themes to make its case against the United States, particularly in a time when racial tensions have flared in the United States.

Colonial legacies, especially that of the unequal and often exploitative relationship that existed between the West and the rest of the world, will continue to make the emerging powers skeptical of the claims and aims of the United States in its approach to them. Even where it was not a colonial power, America will be at a disadvantage in making its case to many of the emerging powers on account of their colonial subservience to many of its European allies.

RUSSIAN AND CHINESE PROPAGANDA

Some analysts have emphasized the role of propaganda, especially Russian disinformation, in shaping the policies of the ten emerging powers.¹³¹ Russian disinformation is real and China's propaganda efforts have also grown more robust in recent years, but the United States should be wary of mistaking genuine differences of national interest with the ten emerging powers for misunderstandings stemming from these propaganda efforts.

Russia is especially adept at shaping the information space by saturating local news and social media platforms with pro-Russia and anti-NATO messages.¹³² It also plays on grievances against the West and capitalizes on the history of Soviet support for anti-colonial movements.¹³³ Some of the emerging powers are more receptive to Russia's messaging, particularly those where Moscow continues to enjoy a positive image due to Soviet-era legacies. For example, the African National Congress tends to sympathize with Russian narratives due to the Soviet Union's support for the party during South Africa's anti-apartheid struggle.¹³⁴ Russian disinformation can also stoke and exploit sometimes dangerous divisions inside nations.¹³⁵

China's propaganda and influence operations are less sophisticated than Russia's but growing.¹³⁶ It has recently expanded its capacity to disseminate its messages through state-run news agencies such as Xinhua and China Global Television News (CGTN).¹³⁷ Xinhua now has thirty-seven bureaus in Africa, outnumbering all other media agencies on the continent.¹³⁸ Most of its content aims to promote positive views of China, cast it as a benign alternative to the United States, and normalize its territorial claims over Taiwan and other contested areas.¹³⁹ There is evidence that China's propaganda efforts may make populations in Africa and Latin America more sympathetic to its political and economic model, but the effects on the overall alignment of these countries' foreign policies appear minimal.¹⁴⁰

There is no evidence that the presence of CGTN or Russia's RT shapes the emerging powers' foreign policy decisions in meaningful ways. To begin with, the effects of Chinese and Russian disinformation in these countries, while difficult to measure with any precision, appear limited to reinforcing preexisting tropes about Western imperialism or other historical legacies.¹⁴¹ The measurable effects on public opinion are not very significant, at least when it comes to Russian efforts, where there is data: a 2022 poll of 137 countries shows that Global South opinions of Russia have declined significantly since the invasion of Ukraine.¹⁴² In Latin America, for instance, where Russian propaganda has been prevalent, disapproval of Russia climbed from an average of 31 percent in 2021 to 61 percent in 2022.¹⁴³ Moreover, it is unclear whether slightly more positive public views of China and Russia due to disinformation would have a significant impact on the emerging powers' foreign policy positions. In short, the role of disinformation should not obscure that, more often, the emerging powers' national interests drive them toward China or Russia.¹⁴⁴

The role of disinformation should not obscure that, more often, the emerging powers' national interests drive them toward China or Russia.

There is thus a risk that the United States will place excessive emphasis on the effects of Russian or Chinese disinformation in an information environment polluted by propaganda that casts U.S. policies in a negative light. Washington could do a better job of conveying its intentions and explaining its policies, but many of the emerging powers will lean toward China and Russia on many issues regardless. For example, emerging powers' views on the war in Ukraine cannot be meaningfully explained as the consequence of Russian disinformation. To view U.S. differences with the emerging powers as the result of disinformation by U.S. adversaries can be pernicious for the United States because it suggests paternalism and reinforces their view of it as a neocolonial power.

DEMOCRACY AND HUMAN RIGHTS

Defending and promoting democracy and human rights is one factor that plays a significant role in the West's approach to Russia and, to a lesser degree, China. This is not the case when it comes to the ten emerging powers. Their voting on UN resolutions indicates some concern about human rights, but that concern did not fundamentally alter their approaches to either Russia or China. For Saudi Arabia, Türkiye, and Thailand, this could be explained by the fact that they are not democracies. Saudi Arabia itself has a bad human rights record. But even the more established democracies—Argentina, Brazil, India, Mexico, and South Africa—have not taken notably different positions on China and Russia. Interests supersede values when it comes to how the emerging powers approach the world. For example,

Indonesia, has the world's largest Muslim population, but it has not spoken out against China's persecution of Uyghur Muslims in the Xinjiang region; Indonesia even blocked a resolution to debate this issue at the UN Human Rights Council in 2022.¹⁴⁵ When asked if it was difficult for his country to criticize China, Jokowi said, "Indonesia wants stability."¹⁴⁶

Even where the emerging powers voice concerns about human rights, this does not preclude them from maintaining friendly relations with the country in question. For example, Türkiye has spoken out against China's policies against the Uyghur population, and it has rejected Beijing's requests to extradite Uyghurs from Türkiye.¹⁴⁷ But Ankara has nevertheless compartmentalized the issue to prevent it from affecting other aspects of its relationship with Beijing.

Democratic affinity with the United States does not increase the likelihood of the emerging powers aligning with it on China or Russia. For instance, despite Washington's strong support for the integrity of the election that brought Lula back to power in Brazil, the country has not aligned more closely with the United States on China—in fact, it has moved in the opposite direction.¹⁴⁸

The emerging powers often also have an abiding skepticism about the West's efforts to universalize liberalism and mold non-Western states in the shape of its democratic model. They tend to be pragmatic about the world's diverse political regimes and seek practical opportunities to profit from other states without running ideological litmus tests. This sentiment

was clearly articulated by Brazil's Foreign Minister Mauro Vieira, when he said that his country will "always talk to everyone," regardless of ideological orientation, under its universalist diplomatic doctrine.¹⁴⁹

For much of the non-Western world, the West's rhetorical support for democracy has too often appeared hypocritical given long-standing U.S. and European backing for dictatorships. The picture is compli-

The emerging powers often have an abiding skepticism about the West's efforts to universalize liberalism and mold non-Western states in the shape of its democratic model.

cated by the fact that most of the democracies among the emerging powers—Argentina, Brazil, Indonesia, Mexico, Nigeria, and South Africa—have at some point been under autocratic regimes that were supported by the United States. It is not that they universally dislike democracy promotion, but that they see the West's pursuit of it as self-interested to the point of being disingenuous. To many of them, the United States promotes democracy selectively to punish rivals and pay lip service to liberal ideals, or as an instrument in its geopolitical struggle for influence with its rivals. This means that U.S. arguments framed in terms of democratic values carry less weight than policymakers in Washington sometimes assume (even if many foreign policy experts know this).¹⁵⁰

POTENTIAL CHANGES IN GOVERNMENT AND LEADERSHIP

To varying degrees, the foreign policy of each of the ten emerging powers could change if their leadership changes. For instance, the power transition that has taken place in Argentina has so far seen Milei vow to dollarize the economy, downgrade ties with China and Russia, and pull out of joining the BRICS—all a far cry from his predecessor's approach. In Türkiye, observers expected opposition leader Kemal Kılıçdaroğlu to adopt a more pro-West foreign policy if he won the 2023 presidential election.

But even in these countries where a change of leadership might have consequences, ties with China or Russia would likely remain fairly strong and domestic pressure could thwart an attempt to change course. For example, former president Jair Bolsonaro struggled to turn Brazil against China due to pressure from the agribusiness lobby.¹⁵¹ In Argentina, Milei may struggle to implement his more radical policies, and many of the business community's ties with China will endure.¹⁵² Since taking office, Milei has softened his rhetoric toward Beijing and made it clear that the private sector should not feel constrained in its dealings with China.¹⁵³ For many of the emerging powers, their ties with China will have staying power from one government to the next.

Other countries, such as India, Indonesia, and South Africa, have deep-rooted traditions of nonalignment and hedging that are unlikely to change with a change in government. Indonesia has adhered to an “independent and active foreign policy” doctrine since its independence in 1945, essentially precluding it from aligning itself with any great power.¹⁵⁴ South Africa's African National Congress, the party that has governed the country since 1994, is also committed to nonalignment.¹⁵⁵ Though it faces a competitive election in 2024, observers still expect it to stay in power,¹⁵⁶ but should it lose, any new government would find it hard to ditch its approach, given the public's strong support for nonalignment.¹⁵⁷

THE LIMITS OF U.S. INFLUENCE

This chapter suggests that the United States' ability to shape the ten emerging powers' alignments is limited and varies across issues and countries. U.S. policymakers therefore need to assess whether it is worthwhile to invest time and diplomatic and economic resources into bringing any of these countries' policies more into alignment with Washington's.

It may be possible to tilt a few of the emerging powers away from Russia, and some may even move away from it over time with the realization that it has less to offer them than it claims. The United States might be able to gradually induce Argentina, Mexico, and Nigeria to adopt positions more in line with its own, but the question is whether this would be worth the effort given that the impact of doing so would be limited. A new generation

of leaders whose worldview is not heavily shaped by the Cold War could also dampen the emerging powers' enthusiasm for ties to Moscow. If Russia used a nuclear weapon in Ukraine, this would likely also lead at least some of them to cut off relations.

But it will be difficult for the United States to meaningfully alter the positions of many of the emerging powers on Russia. Brazil, India, Indonesia, Saudi Arabia, and South Africa are likely to continue to maintain an open diplomatic posture toward Moscow. Türkiye is the most closely aligned with the United States on Ukraine and the only emerging power to have provided the latter with weapons early on. Türkiye's responsiveness to the U.S. request that it prevent transshipments of military goods to Russia suggests that U.S. overtures can make a difference in Ankara. But Erdoğan has a long-standing pragmatic relationship with Putin that he is unlikely to abandon, and he is almost certain to respond negatively to U.S. efforts to twist his arm.

There are also limits to what the United States can achieve in influencing the emerging powers' positions on China. India is the power most closely aligned with the U.S. approach to China, but this should not be mistaken for Washington having outsized influence over New Delhi's future policy. India is aligned on China not because it wants to please the United States but because it sees a common strategic interest. India's security cooperation with the United States results almost entirely from its desire to strengthen its defenses against China.¹⁵⁸ If Washington tried to push New Delhi to go further in countering China, such as by providing support in a Taiwan contingency, it would almost certainly fail. India will not allow its national interests to be defined, or even significantly influenced, by great powers like the United States.

Meanwhile, Brazil, Indonesia, Saudi Arabia, and South Africa seem set on deepening their relations with China and are likewise determined not to allow the United States to dictate the nature of these. For example, Washington failed to get these countries to restrict the use of Huawei equipment in their 5G networks. "We are not afraid of the big bad wolf," Lula's chief adviser said when asked about the United States' opposition to Brazil's technological cooperation with China.¹⁵⁹ Indonesia's geographical and economic imperatives make a significant shift in its approach to China very unlikely. Saudi Arabia under Crown Prince Mohammed bin Salman will not eschew opportunities to cooperate with China. As already noted, changes in government could alter these positions to some degree in certain countries, yet the record suggests that these changes may not have a dramatic effect.

There may be more possibility for the United States to prevent Mexico from pursuing closer ties to China, but even there the picture is complex. There is little question that the United States is more important than China to Mexico's future. But as the United States considers nearshoring supply chains from China to Mexico, Chinese firms too are poised to invest heavily there, which could increase Beijing's influence.¹⁶⁰

On narrow issues, the United States does have some capacity to shape the positions of the

emerging powers. It often gets a positive response when it expresses compelling security concerns about a country's relationship with China. For example, Argentina envisaged allowing China to build a naval base in Ushuaia in 2022 but is now re-considering the project after Washington expressed its concerns. Thailand regularly conducts military exercises with China, but it has an agreement with the United States not to use its F-16 or F-5 fighters in the exercises due to U.S. concerns about intelligence collection by China.¹⁶¹

On the whole, the United States' capacity to directly influence the alignments of the ten emerging powers is limited.

On the whole, the United States' capacity to directly influence the alignments of the ten emerging powers is limited. That is why it needs a different approach.

THE UNITED STATES' POLICY CHALLENGE

The ten emerging powers studied in this report seek independence and flexibility in their foreign policies. They are focused on strengthening their economies, but other factors also shape their actions on the world stage, including their domestic politics, views of what constitutes a just international order, and geographies. Many of them share an ambition for greater global influence and believe that multipolarity will bring them more say in setting the global agenda, more economic benefits, and potentially more security. Most of them were once under European imperial rule, and their Cold War and post–Cold War experiences have been very different from that of the United States. This makes them skeptical of Washington's intentions and uncertain about the value of its historical role in the world. They want strong economic and, in some cases, military relationships with the United States, but they also criticize Washington and seek to guard their sovereignty and independence. These emerging powers are poised to play an increasingly important international role. The question for the United States is what principles should guide its policy toward them.

One popular approach in Washington is to frame relations with these emerging powers as part of its geopolitical competition with Beijing. If U.S. relations with China continue to deteriorate, the pressure in Washington to adopt policies that force these countries to pick a side will almost certainly intensify. Many U.S. policymakers already view the emerging powers through this lens. They seek to create a bloc that ties the powers to Washington through formal agreements, partnerships, and other links, and they try to use military aid, security guarantees, economic assistance, public diplomacy, and influence operations to

pull them away from China and Russia. This approach may be logical, but it is likely to fail, especially if pushed too far.

As this report details, the emerging powers are sure to resist efforts to bring them into a unified bloc with the United States against China and Russia. Overcoming this resistance would almost certainly require an outsized investment of U.S. diplomatic, economic, and military resources—more than is worthwhile. This approach could also lead the United States to turn a blind eye to human rights abuses, misuse its military and other resources, and overextend itself repeatedly, as during the Cold War. With this strategic framing, it could too easily be overly concerned with “losing” key emerging powers to China or Russia—the same logic that once led to the tragic U.S. entanglement in Vietnam. Concerns about domino effects are unwarranted in any case because even when the emerging powers are closer diplomatically, economically, and militarily to Beijing than would be ideal for Washington, they have no more interest in becoming vassals of China than they do in becoming vassals of the United States. More likely, China’s imperious tendencies could strengthen the forces of resistance among most of the emerging powers over time.

Benign neglect of the emerging powers is another approach that has currency in Washington, based on the argument that they are too weak and insignificant to matter for U.S. strategic interests. Downgrading the importance of these powers would free up badly needed military and diplomatic resources for competition with China, while minimizing the risks of

protracted entanglements in their affairs. It might even create leverage for the United States by leading some of these countries to seek its support more eagerly in the face of China’s and Russia’s encroachment on their sovereignty.

The United States needs a strategy that refrains from overreach but accounts for the strategic significance of the emerging powers.

The problem is that Washington cannot ignore the emerging powers in Africa, Asia, Latin America, and the Middle East

and hope to be able to continue to defend its core interests—such as economic prosperity and reducing carbon emissions—around the world. And, if it did ignore these countries, China and Russia would almost certainly not do the same. The result for the United States could be reduced access to the countries’ markets, loss of influence in international organizations, and, in a few cases, constraints on its ability to project military power to fulfill its alliance commitments.

The United States therefore needs a strategy that refrains from overreach but accounts for the strategic significance of the emerging powers. It needs to avoid focusing on great power competition and treat them as sovereign states and important partners in their own right. However, this is likely to be difficult for several reasons.

A BETTER U.S. STRATEGY TOWARD THE EMERGING POWERS

U.S. strategy toward the ten emerging powers should focus on working toward specific shared interests and gradually strengthening the countries' sovereignty and encouraging their active and constructive participation in an international order that is adapted to new power realities.

Focus on Mutual Benefits

It is crucial that the United States put forward an affirmative case for cooperation with these countries based on mutual benefit, rather than a negative case based on the need to counter China's influence. This means that the United States needs to offer a clear value proposition, such as the benefits of working with innovative American entrepreneurs or social and economic gains from highly reliable U.S. technology. Areas of beneficial cooperation will vary by country, but they are likely to include adapting to climate change, combating deforestation and pollution, joining the energy transition, building public health infrastructure, boosting technology manufacturing, preparing for pandemics, diversifying supply chains, developing digital infrastructure, financing infrastructure, and tailoring market access and investment agreements.

De-emphasize Strategic Competition When Engaging With Emerging Powers

The United States must avoid assessing the quality of its relationships with the emerging powers based on their closeness to China or Russia in the context of strategic competition. This means it needs to become comfortable with compartmentalizing areas of common interest and areas of disagreement.

In some cases, Washington also has to look beyond ideological differences. Framing the current global situation in terms of a standoff between democracies and autocracies is unlikely to garner the support of these countries. The United States cannot ignore gross human rights violations by the emerging powers, but it may need to place less emphasis on differences of political regime than it would prefer. No effort to transform these countries' internal politics to align them ideologically with America is warranted or necessary under this strategy. However, anti-corruption efforts could have a role if there is demand for them from the countries' leaders, they target illicit foreign influence, and they strengthen the emerging powers' sovereignty. Democracy support should continue but with a focus on those emerging powers where the demand for it is strong and conditions favorable to progress.¹⁶²

Support Reforms to the Current International Order

As these countries grow into important powers, it is all the more important to ensure they are incorporated in an international order that is conducive to peace and prosperity, rather than left to become dangerous spoilers outside it.

Promoting the constructive participation of the emerging powers in such an order requires that the United States recognize their dissatisfaction with the current system of global governance, adapt its role in the world, and support the evolution of existing institutions accordingly. These countries are unlikely to abandon China-led organizations, but they may put greater value on a reformed version of the current order, which could eventually render the China-led organizations complementary or moot rather than competitors with the existing system. Adaptation will require Washington to make difficult compromises, but it will increase the likelihood that the current order, which greatly benefits the United States, survives and remains relevant. In the best case, America would come to be seen as a champion for the reform of the international system, rather than a hegemon that is averse to change.

Strengthen the Emerging Powers' Sovereignty

Over time, it will be beneficial for the United States to help the emerging powers strengthen their sovereignty, as this will make them more capable of resisting China, Russia, or any other would-be imperial power. Weak states with limited sovereignty invite encroachment by great powers that could spark wars—and preventing wars should be a high priority for U.S. statecraft.

It may seem counterintuitive that strengthening other countries' relative global power would be in America's interest. After all, this approach could slightly dilute U.S. influence, but it would be more conducive to U.S. interests over time, largely because the potential to balance against China would be far greater than it is today. The emerging powers would be in a stronger position to demand that Beijing treat them with greater respect. Beijing would find it more difficult to bribe, influence, or coerce them into accepting its hegemony, buying only its goods, and generally doing its bidding. Giving these countries opportunities for leadership when it comes to the reform of global institutions could also help to diminish U.S.-China competition because Beijing and Washington may find it easier to support the emerging powers' initiatives than each other's.¹⁶³

None of this implies that the United States should seek to strengthen its relations with the emerging powers at all costs. Nor should it entirely ignore their relationships with China and Russia. Washington should still have redlines. At the same time, these countries should be receptive to well-grounded and specific expressions of U.S. concern about its vital security interests. For example, Washington could make a convincing case against an emerging

power increasing its defense ties with China or Russia, such as by allowing the basing of Chinese forces on its territory. In general, the United States should refrain from imposing zero-sum choices on the emerging powers except in those rare cases that pose a major U.S. national security risk.

By adopting an approach to the emerging powers that does not focus primarily on their role in great power competition, the United States would respond to their clear signal that they will resist being treated as pawns. But such a strategy would not be altogether neutral with regard to strategic competition with China. By investing in the sovereignty of the emerging powers, the United States would help them resist Beijing's influence and, at the same time, build a foundation for positive, long-term bilateral relations. With this new approach, the United States would support and collaborate with the countries' as they rise further and exercise greater independence from the great powers. The emerging powers might not align with the United States, but their citizens, including their elites, would likely be more appreciative of such a strategy.

The United States has not always embraced the principle of sovereignty in practice. Like most superpowers, it has meddled in the internal affairs of many smaller states. Washington may thus struggle to make the case that it truly respects the sovereignty of the emerging powers. But if it pursues a sovereignty-based approach consistently over time and builds the right internal strategic framework and decisionmaking structures, it could improve its record and reputation in this regard. U.S. support for sovereignty would gain credence and become an important part of renewed American soft power. Policies toward India under the administrations of Donald Trump and Joe Biden demonstrate the potential for this approach to work—by strengthening India's sovereignty, the United States has supported a counterweight to China's power.

By investing in the sovereignty of the emerging powers, the United States would help them resist Beijing's influence and, at the same time, build a foundation for positive, long-term bilateral relations.

THE CHALLENGE OF ADOPTING A NEW STRATEGY

This strategy may be difficult to adopt and implement because the U.S. foreign policy bureaucracy, Congress, and the public will almost certainly remain focused on strategic competition with China and Russia. They will demand to know where a particular country stands, whether it is moving in the United States' direction and, if not, what American officials are doing to convince it to do so. The substantial power wielded by bureaucratic actors focused on strategic competition with China will exercise a gravitational pull. Other

officials will continue to be tempted to frame their needs in terms of U.S.-China competition to gain attention and resources. The key will be to deprioritize strategic competition in relations with the emerging powers. Peaceful strategic competition with China, and perhaps with Russia, will be the top priority of U.S. policymakers for many years, but it does not need to determine every aspect of U.S. foreign policy.

U.S. policymakers will also have to be careful not to mistake the emerging powers' interest in balancing against China as an interest in joining a U.S.-led bloc. The United States' tendency to frame so much of its foreign policy in terms of competition with China increases this risk. It is important not to misunderstand these countries' efforts to assert their independence from Beijing as evidence that they are siding with Washington. These are not the same thing to them, even though it may appear so to those who think in a binary framing. Expressions of solidarity with the United States can sometimes be nothing more than attempts to balance against China.

The sensible and realistic strategy proposed here would require the United States to exercise restraint and adopt a long-term perspective of its relationships with emerging powers. With a consistent effort, the strategy would pay real dividends by increasing the chances of a stable and predictable international system in which these emerging powers play an important role.

NOTES

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