

Tested, Trusted, Torn?

Emerging Middle Powers Report 2026

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What Keeps Middle Powers Up At Night

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

Respondents in all five countries expect the future international order to centre on multiple plurilateral and **regional arrangements**.

On average, **80%** of respondents across the five countries view the global influence of the **United States** negatively.

Indian respondents rank **Russia** as their country's most important bilateral **partner**, while Brazilian respondents rank **China** first.

53% of German respondents support a **non-aligned** stance, up from **29%** in the previous survey.

89% of Indonesian respondents see **ASEAN** as their country's key international grouping, while **74%** of South African ones say the same about **BRICS**.

Respondents across all five countries expect **military conflicts to escalate** over the next five years.

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Tested, Trusted, Torn?

In every recent year, the emerging middle powers have been tested by events to prove they can prevail over the contested terrain of global politics. In 2026, it is by the US-Israel war against Iran, which has compounded pressures on the global fuel, fertilizer and food markets leaving middle powers to absorb significant costs while finding little traction in efforts to halt the fighting. In 2025, it was by US tariffs, with India and Brazil being among the hardest hit. In 2024, it was by the Israel-Gaza war, now confined but looming darkly. In 2023, the war in Ukraine raised pressing questions about whether emerging middle powers can work together to promote peace and alleviate economic strain, especially in the developing world.

Beneath this rhythm of annual crises, a pattern has emerged. What links the five countries surveyed here is a shared posture: non-alignment as the preferred response to a fragmenting order. Non-alignment here is more the seeking of autonomy and less as a position of neutrality. From Brasília to Pretoria, Jakarta and New Delhi, and more quietly Berlin, experts say their country increasingly resists having to choose sides. This is a pragmatic recalibration to a global order marked by an unpredictable United States, an assertive China and institutions built for an earlier world. The practice of non-alignment still varies (read more on page 45) – Germany’s version is not India’s, and Indonesia’s is not Brazil’s – but the underlying drive is similar. This posture is no longer confined to the Global South.

‘Middle powers and their groupings have been urged to intervene, to say something, to do something.’

With the great powers preoccupied with their own rivalries, the middle powers, emerging or more established, and their groupings have been urged to intervene, to say something, to do something. And, indeed, they see themselves as the ones who can rebuild the international order that has been destroyed and call the great powers to account. But was there ever scope for them to intervene? The US-Israel war against Iran offered a test, and the responses were revealing. A few middle powers like Turkey pursued mediation efforts, but were not able to translate ambition into restraint on the warring parties. Germany initially pursued a course

of cautious political solidarity with the United States and Israel, only belatedly criticizing Washington for its lack of strategic clarity. ASEAN issued a joint statement calling for the cessation of hostilities. The most relevant grouping, BRICS, which many emerging middle powers are part of, could not issue a statement. Iran, a member, urged this, but its adversaries Saudi Arabia and the United Arab Emirates are also members.

Could **India**, which holds the BRICS chairmanship in 2026, have brought together the antagonists within the grouping to forge a common statement? This remains debated. BRICS operates by consensus, and it has limited experience in and appetite for taking active positions on geopolitical disputes, particularly one on which its members hold divergent views. India brings diplomatic depth to the brokerage of rival positions, but the chair’s reach is bound by what the membership will accept and the membership is divided on the war. That is viewed as a missed opportunity, as the findings from this year’s Emerging Middle Powers report demonstrate that BRICS has a distinct role to play as a tool for economic cooperation and a counter to Western influence. It is also striking that the views of Indian experts about relevant partners for their country are broadening to include fellow emerging middle powers, alongside countries such as Germany.

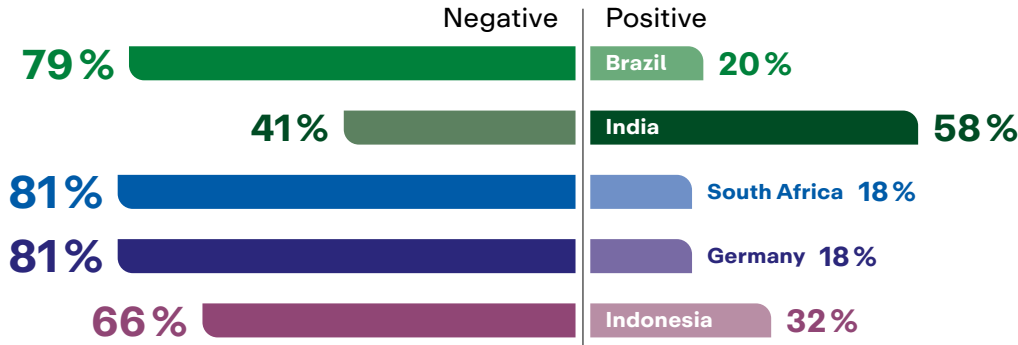
‘Views of Indian experts about relevant partners are broadening to include fellow emerging middle powers, alongside Germany.’

These are increasingly seen as trade and economic partners rather than as security interlocutors aligned with the West. Notably, Indian experts now consider Russia India’s most important bilateral partner, ahead of the United States, which had previously held that position, while China ranks third. In contrast to their peers in the other countries, they view Russia’s influence in India positively, with only 8 per cent viewing it negatively.

From the perspective of **Brazilian experts**, their country’s foreign policy appears to be shaped by external factors now more than in previous years. Approval of the government’s handling of foreign policy is 88 per cent positive – the highest score ever recorded in Brazil – marking a clear inversion of the result in 2023, when 69 per cent rated it negatively.

No trust in US influence

How do you evaluate the influence of the United States in your country?



This is not surprising, considering the change in government; what is distinctive this time is the limited dissent, with only 12 per cent expressing any reservations. The second thing to stand out is the reduced salience of climate and environmental issues. This runs counter to the prevailing diplomatic narrative of Brazil's 'green presidency', yet it also reflects how climate policy has become embedded and naturalized in Brazilian diplomacy. This is now a priority among several, not the defining one. The most consequential result, however, is that only 12 per cent of Brazilian experts rate US influence as positive, compared with 88 per cent who rate it negatively. The United States nonetheless remains seen as the second-most important bilateral relationship after China. For Brazilian experts, the United States appears at once essential and damaging; dependence and disapproval are registered together. This pattern, especially pronounced in Brazil, reflects what diplomats and scholars have long described as the country's pragmatic accommodation with hegemonic powers and an attempt to hedge its bets.

Experts in **South Africa** see the world through a more structural lens than they did a year ago. First, they place less emphasis on the economic agenda and focus more on the shape of the international order itself, in line with the long-standing foreign policy centrality of multilateralism, peace and security, and the reform of global institutions. Second, they view US influence much more negatively: positive views have fallen by roughly two-thirds. This year, 85 per cent view it negatively. The share of respondents with a positive view of Chinese influence has more than doubled, and this alongside the persistence of strong support for non-alignment (72 per cent) suggests that multi-alignment is becoming less a posture of

equidistance and more one of selective leaning. Third, BRICS and the African Union (AU) remain the institutions that South African experts rate most highly, and middle-power agency is overwhelmingly understood as exercised through institutional reform rather than through balancing or hedging.

‘The foreign policy debate has shifted from where South Africa fits in the global economy to where it fits in the global order.’

There is one underlying message: the foreign policy debate has shifted from where South Africa fits in the global economy to where it fits in the global order. That reframing helps explain a counterintuitive finding. Despite a world in disarray, institutional engagement through BRICS, the AU, and the legacy of the G20 chair remains South Africa's favoured instrument in a fragmenting order.

Indonesia, the newcomer in this year's survey, also shows a negative view of the United States' influence in the country (66 per cent negative), compared with China's (26 per cent) and Russia's (36 per cent).

‘Washington is losing favour faster than anticipated.’

The trend is not new, but the stark gap suggests that Washington is losing favour faster than anticipated. A significant finding is that 44 per cent of Indonesian experts view the future of the international order as comprising multiple plurilateral and regional arrangements, in which countries engage in flexible, thematic or regional partnerships. However, this does not translate into strong bilateral

preferences for the surveyed countries. Indonesian experts rate Germany (41 per cent), India (37 per cent), Brazil (32 per cent) and South Africa (26 per cent) as relatively low in importance, with none appearing among their country's top seven partners.

In general, the five surveyed emerging middle powers do not yet view each other as key bilateral partners and alternatives for markets, capital and technology, but rather as fellow travellers in reshaping the order. Despite their geopolitical affinity, there remains a significant connectivity gap among them, with few direct corridors of trade, finance or mobility linking Jakarta to Brasília or Pretoria to New Delhi.

German experts see the world and the global order as defined less by renewal and more by paralysis. Only 17 per cent expect traditional multilateralism to return, while 54 per cent foresee an order shaped by multiple plurilateral and regional arrangements. To navigate this volatility, German experts want the European Union to be a strategic shield. For 48 per cent of them, it is now the top foreign policy priority. The EU is ranked as the most important institution for Germany, in the hope that it can mitigate US tariffs, Chinese economic coercion and geopolitical fragmentation. Unconditional trust in traditional anchors is declining, and there is a shift toward middle-power pragmatism. A majority of 85 per cent view US influence negatively and 53 per cent support non-alignment. The reasons are obvious: the United States is no longer seen as a reliable economic and security partner, but rather as a source of systemic competition and economic coercion. But the dilemma is that the United States remains extremely important – it is at once indispensable and increasingly unpopular.

‘The three major powers Germany long relied on are no longer seen as reliable security and economic partners.’

At the same time, 88 per cent of German experts also view China's influence negatively, and Russia's influence receives no applause in Berlin either. In sum, Germany finds itself in an exceptionally difficult position as the three major powers it long relied on are no longer seen as reliable security and economic partners. This transition comes alongside a move away from values-led diplomacy toward a model of transactional realism.

At the same time, Germany's self-image as a normative and mediating power is increasingly at odds with international perceptions. While it continues to be respected as an economic actor, its recent failure to secure a seat on the UN Security Council suggests a decline in its diplomatic influence. Once widely regarded as a trusted mediator, Germany is now often perceived as having limited political and strategic weight on hard security issues.

Overall, the emerging middle powers are taking refuge in regional groupings – like ASEAN, the AU, the EU, the Indian Ocean Rim Association and Mercosur – which they see as filling the gap left by multilateral gridlock. The five countries are relying more on flexible coalitions and partnerships, and are building relationships by going around stalled institutions rather than through them. Their experts no longer expect the UN or the World Trade Organization (WTO) to deliver. Yet despite their declining effectiveness and the reduced priority emerging middle powers assign to forums such as the G20, G7, the UN and the Bretton Woods institutions, these continue to matter. Their ongoing relevance signals that states still support reforming the existing security and trade architectures and see this as urgent. The emerging middle powers – especially Brazil and India – are seeking more diversified bilateral arrangements alongside a functioning multilateral system, including a restored WTO Appellate Body.

‘Trust is now a strategic asset – one that must be built, sustained and adapted to a fragmenting world.’

The experts from the five surveyed countries expect military conflicts to increase over the next five years, and that their countries will be among the first to absorb the shocks. Yet, even as trade, people and information remain deeply interconnected, the foreign policy imagination is de-globalizing: states are prioritizing regional partnerships, coalitions, plurilateral arrangements and bilateral deals over universal institutions. Consequently, the latter still keep the system functioning, but they no longer generate political momentum or strategic confidence. In a world that increasingly functions in this way, trust becomes a decisive resource. Without it, no coalition can deliver. Trust and consultation are a form of power in their own right.

The emerging middle powers now have to step up. The task ahead is to give their posture content: an agenda for economic diversification, domestic capacity for critical inputs, and reformed security and trade architectures, all pursued through coalitions that will actually deliver. But the deeper need is to recognize that trust is now a strategic asset – one that must be built, sustained and adapted to a fragmenting world. Trust is not static. It erodes when neglected and it must be cultivated where it does not yet exist. ▮

Partners of the KEMP Initiative: Florian Bigge, Leona Harting, Jonathan Lehrer and Sarah Pagung, Körber-Stiftung; Carlos Frederico Coelho and Paulo Esteves, BRICS Policy Center; Gustavo de Carvalho, SAIIA; Dino Patti Djalal and Jenny Winata, FPCI; Manjeet Kripalani, Gateway House India.



Why We Must Seize This Middle-Power Moment

Middle powers can shape the coming world order and carry the burden.

By Susilo Bambang Yudhoyono

It is utterly clear that the old world order is crumbling, but the shape of the next one remains elusive. The UN Security Council has proved incapable of handling defining conflicts of our time, especially those involving the interests of its permanent members. The United States will remain a superpower in the coming decades, but President Donald Trump's 'America First' mantra has fundamentally altered its global leadership, as reflected in the withdrawal of US financial contributions to many UN bodies. Trump's creation of the Board of Peace was widely suspected to be a move to form an alternative version of the United Nations. China has established itself as a great power, but it has been cautious to present itself as a global leader. Meanwhile, the world is witnessing more wars, more conflicts and rising armaments, along with the rivalries that come with them. Meanwhile, confidence in a rules-based world order and in international law has been severely shaken.

‘Middle powers have become credible regional powers in their own right.’

Against this backdrop, one big question arises: Who will take the lead to shape the coming world order and carry the burden?

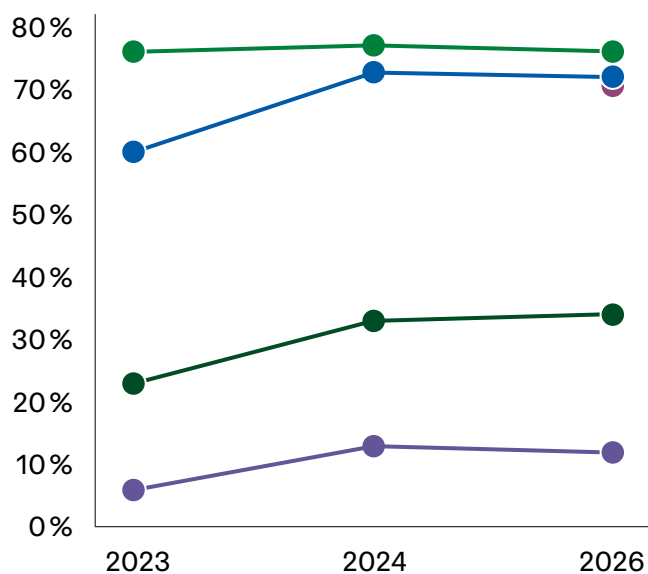
In my view, the answer will not be any particular country, but to a group of aptly labelled countries:

the middle powers. They have the size, resources and ambition to deliver change in the international system. They are scattered in the Global North and Global South. They have become credible regional powers in their own right.

This is true for Indonesia. When I became my country's sixth president in 2004, I led a nation that had significantly evolved from the poverty-stricken people that declared independence right after the Japanese surrender at the end of the Second World War. Indonesia had become the world's third-largest democracy and the largest economy in Southeast Asia, with one of the world's largest Muslim populations. We had become a shining example in the Global South that democracy and development could go hand in hand, and we also demonstrated that democracy and Islam could go together happily. Once we attained political stability, we launched efforts to solidify Southeast Asia. We played an active part in the efforts to establish the ASEAN Charter, which placed emphasis on democracy and human rights. We pushed countries around the world to sign the Treaty of Amity and Cooperation. We also helped push the formation of an East Asia Summit that would include Australia, India, China, US, Russia, Japan, South Korea, among others. Indonesia also created the Bali Democracy Forum, the only inter-governmental forum in Asia that provides a region-wide platform to discuss democracy issues.

How do you evaluate China's influence globally?

Respondents: Positive

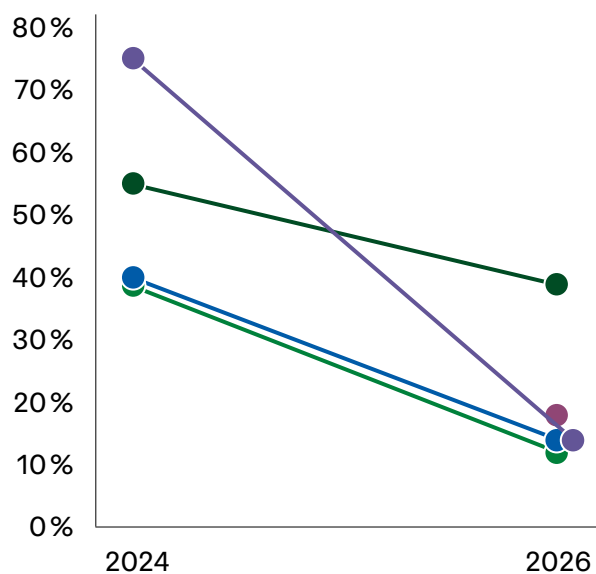


● Brazil ● India ● South Africa ● Germany ● Indonesia

Indonesia joined this year, so there are no comparable values.

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

Respondents: Positive



These events demonstrated how a middle power such as Indonesia, despite our limited resources and with diplomatic perseverance, can create diplomatic space in the international system. Our independent and active foreign policy, which means we are not structurally allied with or tied to any power, allows us to move freely in world. Many other middle powers in the Global South also embrace strategic autonomy, which gives them the versatility to determine their positioning. But middle powers of the Global North are also actively repositioning themselves in the shifting geopolitical landscape. For example, Germany is stepping up to build the largest conventional armed forces in Europe and has become the largest provider of overseas development assistance.

‘We are moving in the wrong direction, with the renewed possibility of spheres of influence.’

There are about two dozen middle powers in the international system and their number will keep growing. What is more, we are seeing a process in which they are forming new alignments. This is a welcome development. Indonesia and Australia have recently signed an agreement to work together more closely on security issues. Mexico and Canada have recently signed a Comprehensive Strategic Partnership while they

are negotiating a new trade agreement with the United States.

I firmly believe in the dictum that every crisis presents opportunity. The old world order is not coming back, and we are moving in the wrong direction, with the renewed possibility of spheres of influence, ‘might makes right’, growing mistrust and zero-sum rivalry, and mushrooming narrow nationalism. We therefore must seize this middle-power moment. The middle powers of the Global North and Global South can help reset world affairs in the right direction. They can work together to refresh multilateralism, and perhaps even increase their contribution to UN bodies to close the funding gap – most can certainly afford to do so. Where possible, they can help to mediate international conflicts, as Pakistan attempted recently between the United States and Iran. They can help refocus global attention on climate change and development, issues that matter a great deal to the majority of the world population. They can bolster regionalism in their respective neighbourhoods to ensure that the coming world order will consist of stable and peaceful regions. And of course, they can renew the international commitment and belief in the ideals of the UN Charter and act accordingly. ↗

Susilo Bambang Yudhoyono

is the former president of the Republic of Indonesia.

What We Owe a Post-Imperial World

There are leaders who can never get enough of war. It is time to build an order strong enough to restrain them. By Olaf Scholz



When Immanuel Kant presented his famous philosophical draft for a modern international law in Königsberg in 1795, his world was anything but peaceful. True, Prussia had just barely managed to secure the Peace of Basel after grueling years of war against revolutionary France. But Kant feared, not without reason, that this would prove to be nothing more than another temporary ceasefire. As usual, ‘heads of state, who can never get enough of war,’ would soon launch their next campaigns.

This recurring experience was the starting point for Kant’s treatise on ‘Perpetual Peace.’ To overcome the existing ‘state of nature’ of war between states and to replace the right of the stronger with the strength of the law was his revolutionary idea. ‘The rights of men must be held sacred,’ he insisted, ‘no matter how great a sacrifice it may cost the ruling power.’

Kant’s ideas were first enshrined in the League of Nations after the First World War, and then in 1945 in the Charter of the United Nations: a world order in which power is bound by rules including the idea of a ‘federalism of free states’ and the principle of non-interference. ‘No state should violently interfere in the constitution and government of another state,’ Kant had demanded, an early rejection of regime change as a legitimate cause of war. No state should have to fear being threatened, harassed, or occupied by larger or stronger states. Entirely in keeping with Kant’s spirit, the general prohibition on the use of force and the prohibition on intervention under Article 2 of the UN Charter are now part of international law. And Germany’s constitution, in Article 25, stipulates that the general rules of international law are also an integral part of German federal law.

Unfortunately, there are still ‘heads of state who can never get enough of war’, and progress that has been achieved can be lost again. Various developments in recent years make it clear that the willingness to disregard international law is undiminished. The hope that a rules-based international order, multilateral organizations, and collective security systems could finally civilize the international community remains unrealized.

The most glaring recent example of this is Russia’s war of aggression against all of Ukraine, which President Vladimir Putin launched unprovoked in February 2022. For more than four years, the Ukrainian people have borne the brunt of this imperialist invasion. At the time, I described this as a *Zeitenwende*, a ‘turning point’, because this war will determine more than the fate of Ukraine and even more than the future of Russia, the world’s largest country by land area. For above all, Putin’s war of aggression is a fundamental break with the basic principles of the rules-based international legal order established since 1945.

‘It is difficult to see how recent actions taken by the United States regarding Greenland, Venezuela, or Iran could possibly be compatible with international law.’

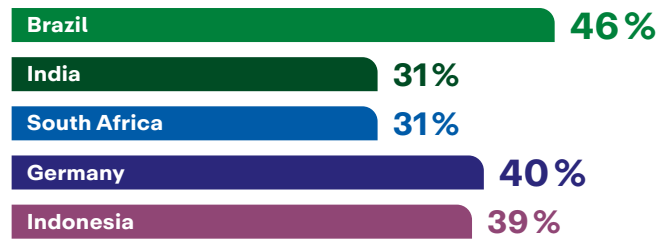
This order includes the unconditional agreement that borders must not be shifted by force. It also involves overcoming the disastrous concept of ‘spheres of influence’, which allows great powers to pressure or even conquer smaller states at will – simply because they can or consider themselves historically justified in doing so. That is why the agreement must remain in place. No state is merely the ‘backyard’ of another, stronger state. Every state, regardless of its size, has a right to territorial integrity. There should be neither a ‘Western Hemisphere’ nor a ‘Russian World’ or a ‘Sinosphere’. Every state has the right to decide sovereignly its own path and its alliances. Given these considerations, it is difficult to see how recent actions taken by the United States regarding Greenland, Venezuela, or Iran could possibly be compatible with international law.

The international community, as represented by the United Nations, condemned Russia’s 2022 aggression against Ukraine by an overwhelming majority. That was an encouraging sign. But the principled rejection of revisionism of any kind under international law remains a challenge. For it is undeniable that the world’s borders and territorial arrangements, as they exist today, are often the result of past wars or arbitrary decisions by former colonial powers. This is perceived as historically unjust. Consequently, demands to correct international borders and restore former conditions are repeatedly being voiced all over the world.

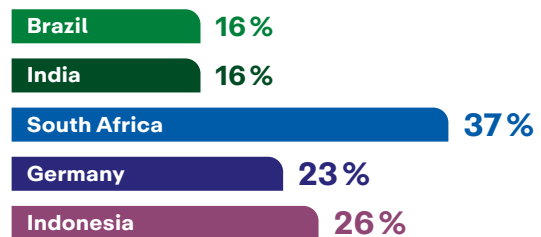
US-China power split

How would you describe the global current distribution of power?

Between the US and China



Between many different powers



It is thanks to Germany’s Chancellor Willy Brandt that such demands will never come from Germany. The question of the border between Germany and Poland along the Oder and Neisse rivers was definitively settled in the 1970 Warsaw Treaty and the 1990 Two Plus Four Treaty. But elsewhere in the world historically rooted resentment continues to be a powerful driving force behind revisionism in international law. Much would therefore be gained if borders, however arbitrarily drawn, were no longer called into question, thereby becoming the cause of new wars aimed at changing them.

‘The praise for the rules-based international order does not immediately convince everyone in Africa or Asia.’

Of course, many countries in the Global South were still foreign-ruled colonies when the UN Charter was adopted by 50 founding members in 1945. Not only were the peoples of these colonies not allowed to have a say in the adoption of the rules of international law that are in force today; these rules also did not protect them. It is therefore not hard to understand that praise for the ‘rules-based international order’ does not immediately convince everyone in Africa or Asia. There is deep-seated mistrust of a West that often seems to insist on compliance with ‘universal’ rules precisely when they serve its own interests.

All these difficulties and challenges must be understood if one wishes to contribute today to a

post-imperial world, as described by the political scientist Adom Getachew. Obviously, a resilient, rules-based order in a new era of multipolarity will be easier to achieve if the representatives of the ‘old West’ demonstrate considerable humility. We cannot take it for granted that our conduct will be perceived as honest. The trust without which no rules-based order can endure must be earned through many small steps and reaffirmed time and again.

‘A shared commitment to the fundamental values and principles of democracy can be the glue that brings together states from very different regions of the world.’

What can help in this regard is patient work towards the broadest possible consensus among the world’s democracies. Unlike in Kant’s time, and despite current worrying developments, democracy is now a form of government found throughout the world. The spectrum of democratic systems is vast. In many countries, democracy functions differently than it does in Germany, and even within the European Union its forms diverge widely. Nevertheless, a shared commitment to the fundamental values and principles of democracy can be the glue that brings together and holds together states from very different regions of the world.

The fact that the world’s democratic states recognize one another as like-minded, however, must not prevent advancing orderly cooperation among all states, regardless of their internal political systems. The shared rejection of border revisions is therefore of central importance. We should also strive to ensure that all states respect the principle of habeas corpus in relation to their citizens. Opponents of the government do not belong in prison anywhere. It should be our ambition to achieve both goals in this century. This is possible and represents the fulfilment of Kant’s vision.

At the same time, strengthening democracy around the world remains necessary. Just to illustrate my point, it was particularly important to me as chancellor to invite key democratic nations from the Global South to the G7 summit in Germany in 2022, a few months after Russia’s invasion of Ukraine. That is why India, Indonesia, South Africa, Senegal, and Argentina were represented at Schloss Elmau as friends and dialogue partners. For it was and remains important to demonstrate that democracy and the rules-based international order are not merely ‘Western values’, but can – and should – be universal principles shared by like-minded partners in the emerging multipolar world.

Promoting this message will become even more important in the future, but this can only succeed if it is never perceived in the Global South as patronizing or condescending. In Europe (including Germany), we often still fail to fully grasp how

sensitively – indeed, how allergically – people in countries of the Global South react to lectures from the ‘old West.’ As Germans and Europeans, we would do well to ease this atmosphere with great caution. We should abandon the still widespread notion of Europe as the ultimate benchmark of historical development – a necessary process of adjustment that the Indian historian Dipesh Chakrabarty has termed ‘provincializing Europe’.

‘Europe will no longer be the linchpin but rather one significant global province among others.’

In an evolving multipolar world with 10 billion inhabitants, Europe will no longer be the linchpin but rather one significant global province among other significant global provinces. Not viewing this as a historical decline and humiliation is one of the great challenges we face today. This is a challenge facing the entire Global North, which of course, includes Russia. We will not overcome it through nostalgic navel-gazing, but with a great deal of pragmatism and a willingness to embrace the changes in the world.

Then it will become clear that, as self-assured equals, we can and will continue to make our contribution to the world. Here, too, we would do well to take our cue from Kant. Throughout his entire life, the philosopher never left his native province of East Prussia even for one single day. That did not prevent him from presenting a groundbreaking blueprint for a peace to encompass the entire world. ↩

Olaf Scholz

is a member of the German Parliament and the former chancellor of Germany.





‘The Veto Is Not Untouchable’

South Africa’s Ronald Lamola wants to reform the UN Security Council and rally the world’s middle powers behind it – while managing rising friction with the United States. Can the plan succeed?

Körber-Stiftung: Under President Donald Trump, the United States is trying to diplomatically isolate your government and accuses it of not treating white people in South Africa fairly. There is no truth to that; we know that. The question is: How do you deal with a country on which you are still heavily dependent in terms of trade and development cooperation?

Ronald Lamola: Look, the US is our second-largest trading partner; 200,000 jobs in South Africa depend on it. And we still see the US as a very important strategic partner. So that’s why we are pragmatic with them. The tensions with the Trump administration are largely ideological, often based on narratives that do not stand up to scrutiny. But there is no fundamental disconnect at the business level, and we are very glad about that.

You’re trying to separate ideological differences with the US administration from trade issues. But the White House appears to be putting everything into one basket. Germany finds itself in a similar position. Is that strategy really feasible?

Your analysis is correct. This is why, when we meet with the White House, we make it clear that trade issues – such as tariffs and the African Growth and Opportunity Act, which gives beneficial treatment to goods from sub-Saharan African countries – should be negotiated on their own terms, not linked to domestic matters within South Africa’s sovereignty. Policies like Black Economic Empowerment are for our own institutions to manage. Linking them to trade only complicates negotiations and makes progress harder. I hope this becomes clear to the White House.

Let us speak about middle powers and their stance on issues like the wars in Iran and Ukraine, or like Venezuela. It often seems that they have little say when it comes to questions of war and peace. Why is that?

Coordination is difficult. That is why we invest in platforms such as the Hague Group, BRICS and other Global South forums. They are imperfect but they create the necessary space for middle powers to speak collectively and defend shared principles such as those in the UN Charter and democratic norms.

Middle powers want agency

How should emerging middle powers rebuild the international order?

Pushing for global governance reform

Average of Brazil, India, Indonesia, and South Africa

93%

Germany

86%

Defending sovereignty and territorial integrity

Average of Brazil, India, Indonesia, and South Africa

91%

Germany

90%

But what can we realistically expect from middle-power cooperation in a fragmented geopolitical landscape?

Middle powers are already speaking out against violations of international law, such as the US capture of Nicolás Maduro in Venezuela. Regarding Iran, the United Nations process has been one-sided. While we condemn retaliatory strikes, any resolution must address the initial aggressions that derailed diplomatic efforts.

Is the international legal order failing?

The problem is not the absence of rules, but the failure to follow them, particularly by the United States. However, this is no reason for despair. The UN system has underpinned the global order since the Second World War and cannot simply be discarded because one country chooses to ignore it. Accountability takes time, which is why reform is essential to defending the UN Charter.

How do you view South Africa's relationship with Germany?

We have a strong relationship grounded in shared values: constitutionalism and the rule of law. Even where we differ, such as on the Middle East or our case against Israel at the International Court of Justice (ICJ), Germany engages constructively and respects our position. This contrasts with the United States, with which disagreements have sometimes led to punitive measures rather than dialogue.

What is the most misunderstood aspect of South Africa's foreign policy?

A key misunderstanding in Germany concerns our position in the ICJ case. This was not a political choice but a legal and moral obligation under the Genocide Convention. We did not take sides militarily; we turned instead to international law and

the institutions designed for exactly this purpose. If resorting to the ICJ is criticized, it raises a broader question: Where, then, should such disputes be addressed?

You've already mentioned UN reform. Given the resistance from the five permanent members of the Security Council (P5) to meaningful reform, is the Ezulwini Consensus – Africa's demand for at least two permanent seats with veto power in the UN Security Council – still viable?

Momentum is growing, and even the P5 now broadly acknowledge the need for African permanent seats. The key sticking point is the veto. We believe the veto must be part of the discussion; it is not untouchable, and it has frequently limited the effectiveness of the UN Security Council. Africa will continue to advocate a common position through rigorous negotiation.

President Trump blocks South Africa from attending this year's G20 summit, which will be held in the United States. How can the forum remain a useful vehicle for African priorities?

If a G20 meeting excludes a founding member, it cannot be considered a full G20. South Africa remains committed, and our absence from previous sessions was not by choice – we were not invited. The African Union's inclusion is not intended to replace South Africa's role, but to amplify the continent's collective voice alongside us. ♣

The interview was conducted on 14 April 2026 by Leona Harting and Jonathan Lehrer.

Ronald Lamola

is the minister of international relations and cooperation of South Africa.



Why Middle Powers Just Deliver Niche Security

From Iran to Gaza, middle powers keep the world running, but they struggle to prevent wars and endorse ceasefires. By Shashi Tharoor

The idea of emerging middle powers has gained renewed salience in recent years. It recognizes that the world is no longer defined solely by the gravitational pull of superpowers but instead defined by a wider constellation of states. The latter derive influence not from dominance but from strategic positioning, economic weight, diplomatic agility and normative ambition.

However, we must acknowledge that middle powers are not a monolith. The data in the 2026 Emerging Middle Powers Survey reveal a central paradox: while middle powers share a desire for a multipolar world, they are increasingly norm-shapers for their own specific camps rather than a unified bloc. For example, South Africa may view global conflicts through the lens of anti-colonialism while others, like India, prioritize a third path of strategic autonomy. This ideological split means that, while these powers have enough influence to frame a narrative, they often struggle to coordinate

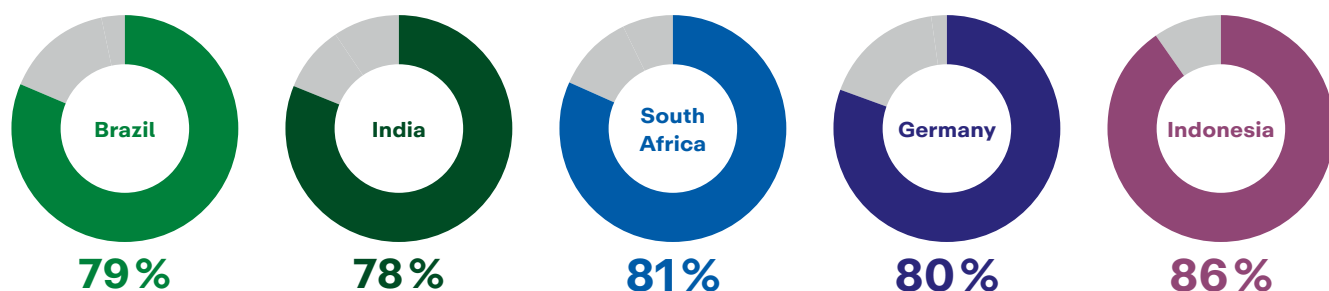
on a common solution when their historical legacies or regional security needs diverge.

The survey findings for India clearly reflect the turbulence of the past year. US President Donald Trump's conduct, including the sudden imposition of 50 per cent tariffs on Indian goods and his new-found friendship with Pakistan's Field Marshal Asim Munir, undoubtedly lie behind the decline in the United States' standing in India. Worries about China also persist, prompting reaffirmation of the view that Russia is the one stable and predictable major power on India's horizon.

This Indian preference for Russia often puzzles peers in Brazil or Indonesia. For New Delhi, Moscow's predictability is not about shared values, but about a decades-long security partnership that has remained immune to the volatile America First shifts or the direct territorial threat posed by China. While Brazil or Indonesia might view China primarily as an economic engine, India's pessimism

Escalation expected

Over the next five years, do you think global military conflicts will escalate? Respondents: Yes



about it is rooted in a fundamental border rivalry that makes its reliance on Russia a pragmatic necessity for maintaining regional balance. An interesting feature of the survey is the high and increasing priority given in India to trade relations, which would not have been the case even a decade ago.

‘Middle powers are rarely fast enough to stop a hot war.’

A sobering question remains: Can middle powers actually deliver on security? The short answer is that they are excellent at keeping the plumbing of the world running but often struggle to turn off the faucet during a flood. We have seen this in the wars in Gaza and Iran. Middle powers deliver niche security – think of Qatar’s hostage negotiations or the United Arab Emirates’ role in managing regional stability. However, they lack the hard power to enforce ceasefires. Furthermore, they are rarely fast enough to stop a hot war. Because they are more vulnerable than superpowers to economic shocks, they often hedge, waiting to calculate the impact on their trade with China or the United States before acting.

‘We should expect emerging middle powers to play an even more consequential role than their current one.’

Their role will not be to replace great powers but to moderate, mediate and innovate – to act as stabilizers in a world where stability is increasingly scarce. While at the time of writing they had exercised strategic restraint on the Iran War, perhaps because they could not see an opening to exercise meaningful influence, they view themselves as stakeholders of the global architecture and would surely act, ideally in concert with others, should there be a further deterioration.

In this evolving landscape, middle powers like India should be expected to articulate a vision of global order that is more inclusive, more representative and more attuned to the developmental needs

of the Global South. They will need to balance their national interests with global responsibilities, navigate great-power competition without being subsumed by it and build coalitions that can deliver tangible outcomes.

We should expect emerging middle powers to play an even more consequential role than their current one. The global environment will remain unsettled: geopolitical turbulence will persist, economic fragmentation will deepen and multilateral institutions will continue to struggle. Yet these very conditions will make the contributions of middle powers more essential. They will be called upon to stabilize regional orders, to keep channels of dialogue open when great powers are at odds and to craft coalitions capable of addressing transnational challenges that no single state can manage alone.

Their success will depend not only on their national capacity but also on their ability to work with one another – ranging from formal groupings to flexible, issue-based partnerships. The international system will likely become more fragmented than it is today, but also more open to new forms of leadership. The emerging middle powers will have the opportunity as well as the obligation to step forward. Their ability to do so – confidently, coherently and collaboratively – will shape their own future and the future of global governance. ↯



Shashi Tharoor is an Indian politician, author, public intellectual and diplomat.

Be Dynamic, Be Like Brazil



Even amid rising geopolitical tensions, Brazil continues to advance trade agreements – and that is no coincidence. By Tatiana Prazeres

The centre of gravity in global affairs has been shifting to geoeconomics, with trade policy increasingly influenced by security concerns, industrial strategies, and strategic rivalry. Fragmentation, unilateral measures, and pressures on established rules have strained the multilateral trading system. Yet this same context has created room for middle powers to act as bridge-builders, coalition partners, and pragmatic defenders of rules-based trade. While geoeconomic fragmentation poses significant challenges, it may create opportunities for middle powers to exercise greater agency.

Brazil's trajectory is a good illustration of this dual dynamic in which rising frictions and competition also create incentives for cooperation. Even as geopolitical tensions rise, the country has advanced a series of trade agreements and deepened engagement with partners across regions. What may appear as a paradox – greater fragmentation alongside renewed integration – is in fact a strategic deliberative pivot towards diversification,

predictability and legal certainty. Agreements that took decades to negotiate are now moving forward, suggesting that economic cooperation remains both viable and necessary.

‘Brazil had to manage frictions related to the EU’s sustainability framework.’

At the centre of this strategy is the Mercosur–European Union Agreement, provisionally in force since 1 May 2026. It exemplifies Brazil's middle-power diplomacy, connecting two regions with shared values and long-term interests while sending a clear signal in favour of openness and predictability. Its swift ratification by the congresses of Brazil, Argentina, Paraguay, and Uruguay – completed in less than three months – also points to broad political support, a momentum likely sharpened by the current geopolitical climate.

In advancing the Mercosur-EU Agreement, Brazil also had to manage frictions related to the

EU's evolving sustainability framework, particularly the EU Deforestation Regulation. While Mercosur countries expressed concerns regarding the measure's sustainability benefits, trade impact and consistency with WTO principles, the negotiations moved forward through pragmatic engagement and dialogue. The final agreement preserves regulatory autonomy on both sides while incorporating mechanisms aimed at safeguarding the balance of negotiated concessions and ensuring greater predictability for exporters.

This agreement is part of a broader expansion of Brazil's trade network. In April 2026, two additional agreements were submitted to Congress, Mercosur-EFTA and Mercosur-Singapore. Together, these initiatives increase the share of Brazilian exports covered by trade preferences from around 12 per cent to 31 per cent, marking the most significant expansion of the country's trade agreements to date. Additionally, negotiations with partners such as Canada have regained pace, reflecting a growing global urge for stable, rules-based partnerships amidst systemic instability.

‘Brazil’s response to the tariffs illustrates the balancing act faced by middle powers.’

Brazil's response to the 2025 wave of unilateral tariff measures, notably the 50 per cent US tariffs impacting on one-third of shipments, illustrates the balancing act faced by middle powers. Brazil has emphasized dialogue and mutually beneficial solutions, while underscoring that engagement must be based on respect and the preservation of national interests. This year's report confirms that expert perceptions have shifted: key partners remain important, but their role is increasingly seen through the lens of risk and uncertainty, reinforcing the importance of diversification.

Despite these pressures, Brazil's trade performance has remained robust. Record export and import levels in 2025, alongside a record number of exporting firms, point to a diversified international footprint that provides a natural buffer for Brazil against bilateral disputes.

Brazil has also remained actively engaged in discussions on the reform of global trade governance. Its position reflects a dual-track approach: advancing bilateral and plurilateral agreements while supporting a stronger multilateral system. There is broad backing for a stronger WTO, alongside continued engagement in trade negotiations. This is not a choice between paths, but a combination of both.

By hosting COP30 and chairing BRICS in 2025, Brazil has placed itself at the centre of discussions on sustainability, development, and economic cooperation. In a more fragmented and uncertain world, Brazil's approach remains anchored in openness and flexibility. The country is not willing to take sides and is actively engaged in preserving

Trade as top concern

How important are international trade and the economy for your country's foreign policy?



the conditions that make non-automatic alignment viable. By maintaining relations with a wide range of partners and investing in a diversified network of agreements and forums, Brazil strengthens its resilience and expands its room for maneuver. In doing so, it illustrates how middle powers can remain central to adaptation of the international trading system. ↵



Tatiana Prazeres is Brazil's foreign trade secretary at the Ministry of Development, Industry, Trade and Services.



Defending Where We Still Can

Canada has a roadmap for a messy world, and it is a good one. By Anita Anand

We find ourselves at a moment of profound geopolitical volatility and economic transformation. Canada, as a trade-oriented economy and middle power, is laser-focused on diversifying our trade relationships to reduce overdependence and create opportunities and resilience for our people.

In his address at the World Economic Forum in Davos in January, Prime Minister Mark Carney described a ruptured international order – one that requires countries to act with flexibility to deliver results. Canada’s approach is grounded in what we call ‘principled pragmatism’. It means defending the rules-based system where we still can, and adapting to its limits where we must.

This approach requires attracting unprecedented levels of investment and building resilient supply chains while ensuring that we uphold long-standing values, including respect for international law. In a world of uncertainty, capital is cautious. It flows when economies, and the structures that support them, are confident.

Turning confidence into concrete outcomes requires action. In the first four months of this year, we have secured over CA\$10 billion in commercial deals for Canadian businesses. We are establishing new trade relationships with major economies around the world, including a comprehensive economic partnership agreement with India, a middle power like Canada, and free trade agreements with the Association of Southeast Asian Nations and Mercosur. We are also advancing agreements with the Philippines and Thailand, while supporting the expansion of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) to include Costa Rica and Uruguay. Taken together, these agreements are more than commercial instruments. They are the architecture of a more diversified and resilient Canadian economy.

Canada is also doubling down on our existing relationships with trusted partners like the European

Union and Germany. Thanks to the Canada-EU Comprehensive Economic and Trade Agreement, Canadian merchandise exports to the EU increased from \$22.9 billion in 2016 to \$42.7 billion in 2025 – an 86.5 per cent rise. And we are deepening our partnership: this year, Canada became the first non-European nation to join the EU’s Security Action for Europe (SAFE) programme.

As we strengthen ties with Europe, we are particularly focused on building a closer relationship with Germany, one of its leading export economies. Like Canada, Germany understands that prosperity depends on open markets, diversified trade and resilient supply chains. As Prime Minister Carney and Chancellor Friedrich Merz have agreed, our two countries will deepen transatlantic ties, including through stronger linkages between the EU and CPTPP economies, and act jointly to shape the rules that will govern the next era of global trade.

In this increasingly uncertain world, Canada and Germany, as G7 members and strong middle powers, cannot afford to act alone. The era in which middle powers could quietly benefit from an order designed and underwritten by others is drawing to a close. Countries like ours have the capacity and the responsibility to help stabilize the international system. That means seeing the world as it is, not only as we wish it to be, and working together to advance practical solutions rooted in shared interests and values.

By acting together, middle powers can help build a more secure, sustainable and fair global order that reflects our interests, strengthens our resilience and delivers results for our citizens.

This is Canada’s mission. And we seek to pursue it in partnership with our German and European friends. ▮

Anita Anand
is the minister of foreign affairs of Canada.

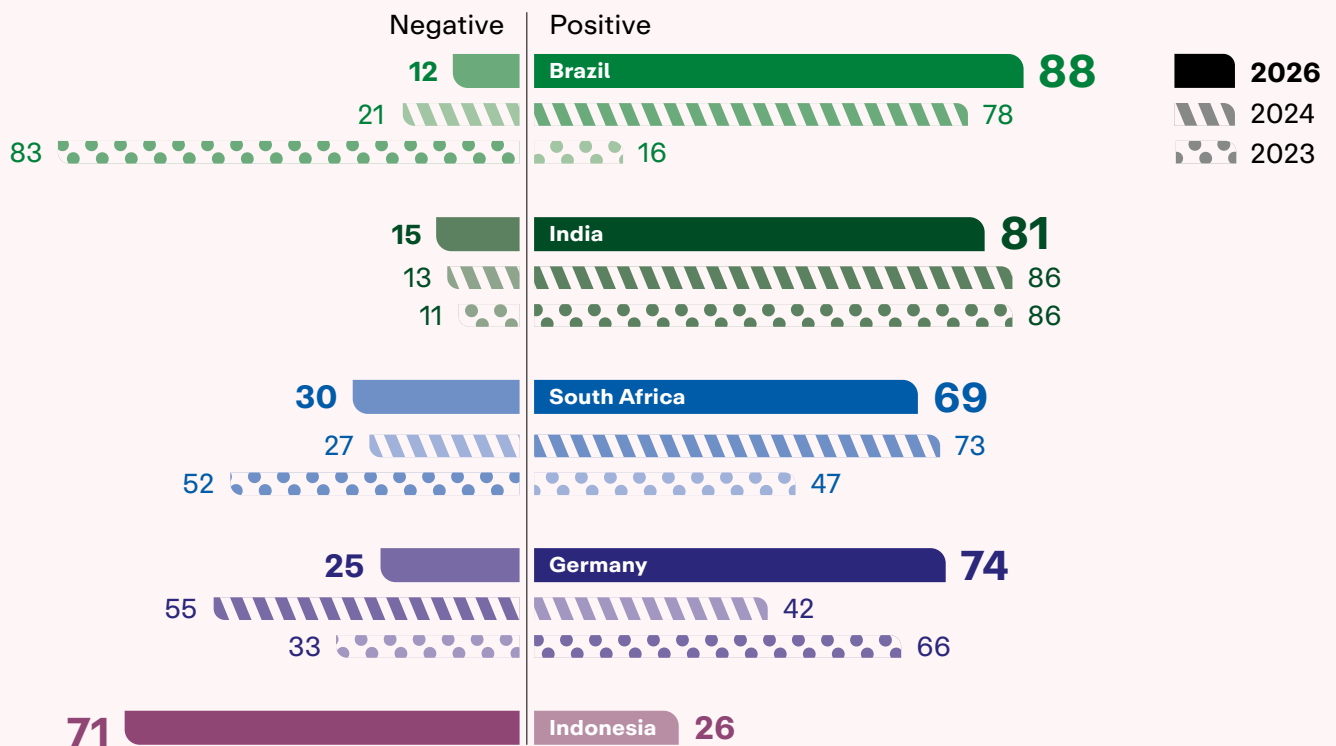
Emerging Middle Powers Survey

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

Foreign Policy and Strategic Positioning

Good marks for foreign policy

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



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



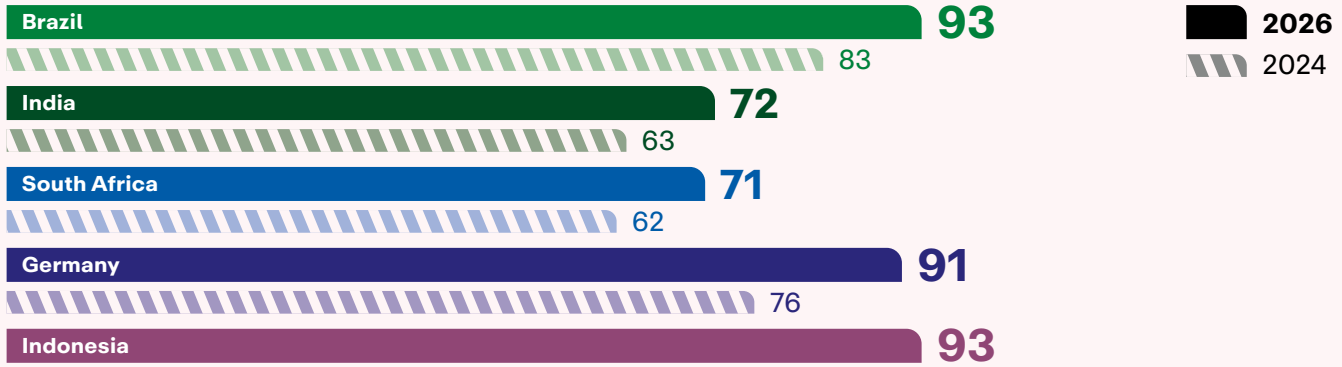
Compare with results from 2024

Indonesia joined this year, so there are no comparable values.

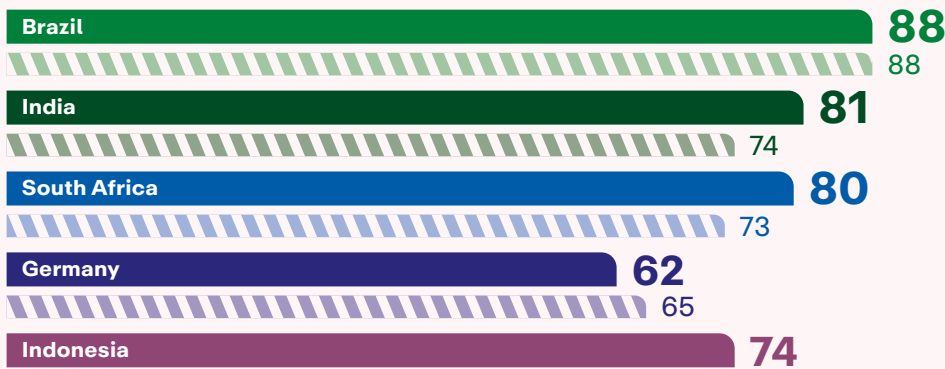
Governments shape foreign policy

Who shapes the foreign policy of your country the most?

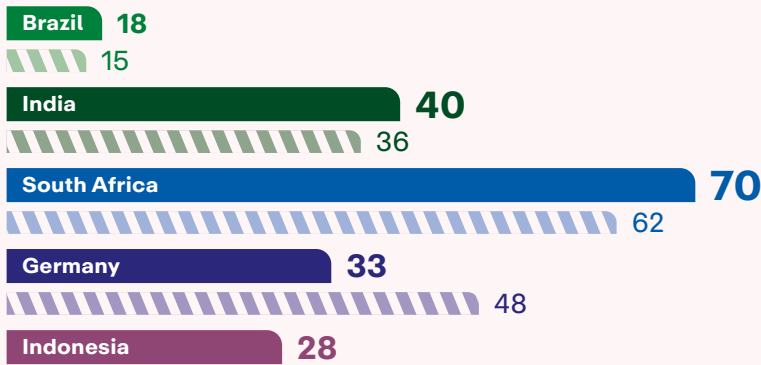
Head of government



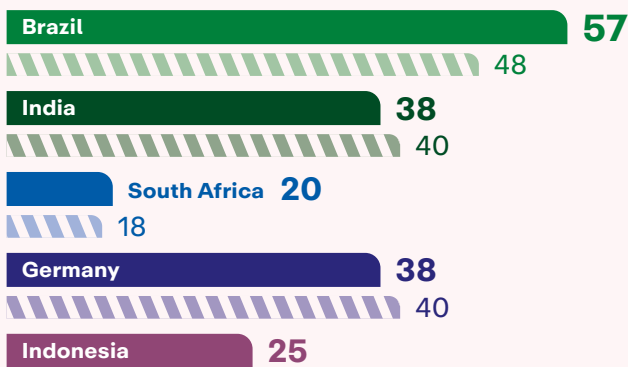
Ministry of Foreign Affairs



Ruling political parties



Business sector



all results in per cent, answer 'don't know' and 'no answer' ranged from 0 to 1 per cent for all issues

Neighbours come first

How important are your bilateral relations with ... ?



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

Trade as top concern

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

Brazil



India



South Africa



Germany



Indonesia



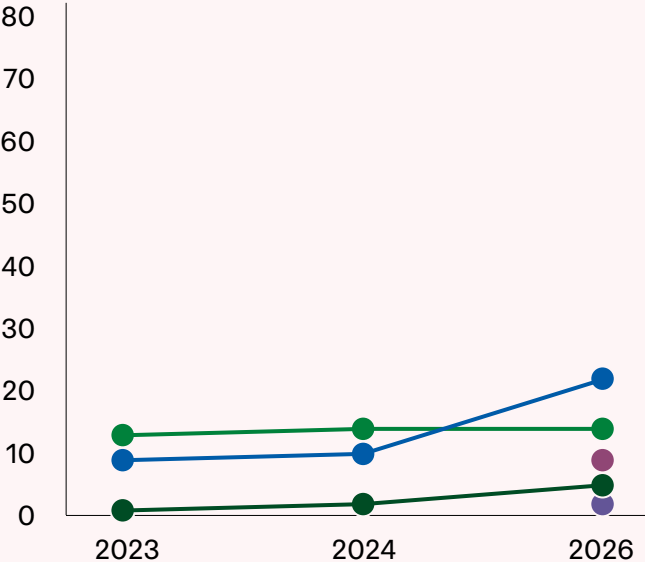
all results in per cent, answer 'don't know' and 'no answer' ranged from 2 to 24 per cent for all issues

Global Power Dynamics

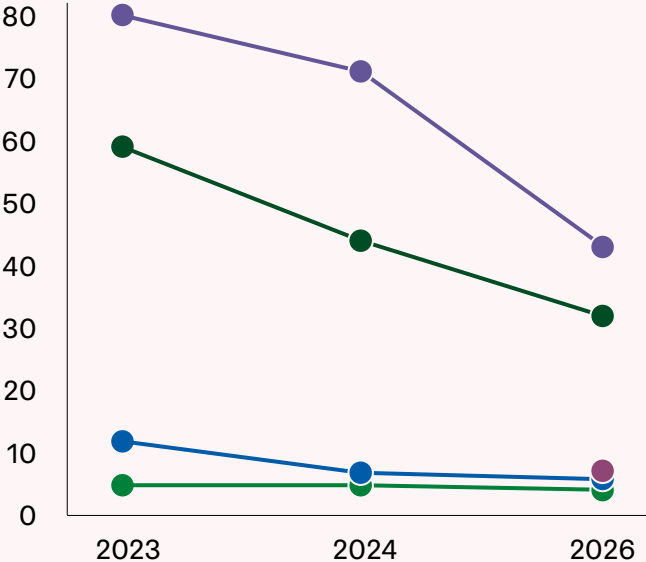
Germany: Latecomer to non-alignment

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

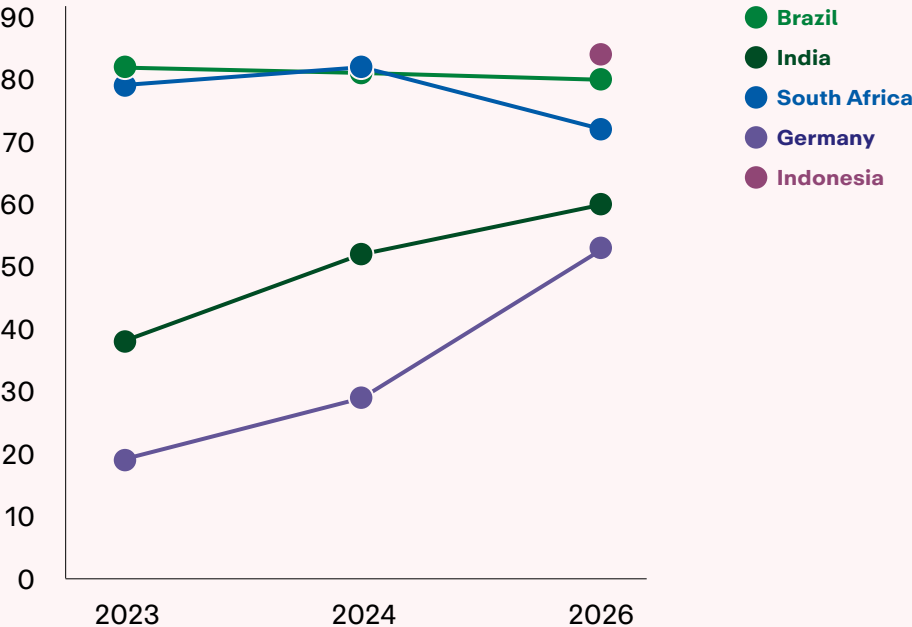
Chinese side



US side



Neutral/non-aligned

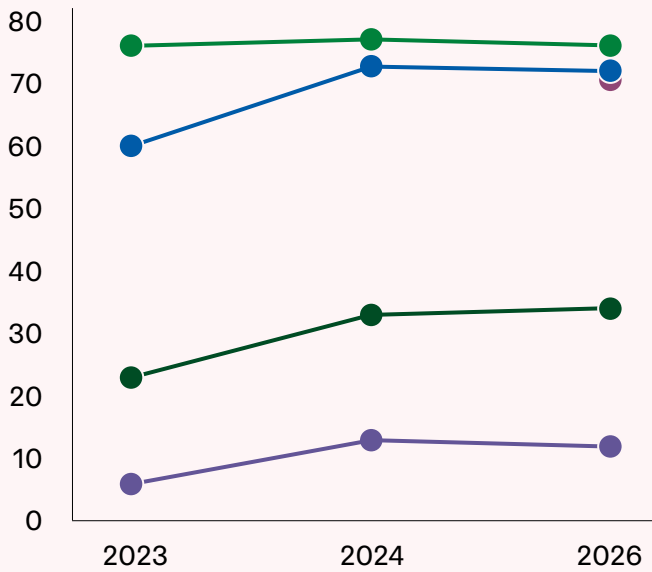


all results in per cent, answer 'don't know' and 'no answer' ranged from 1 to 3 per cent for all issues

No trust in US influence

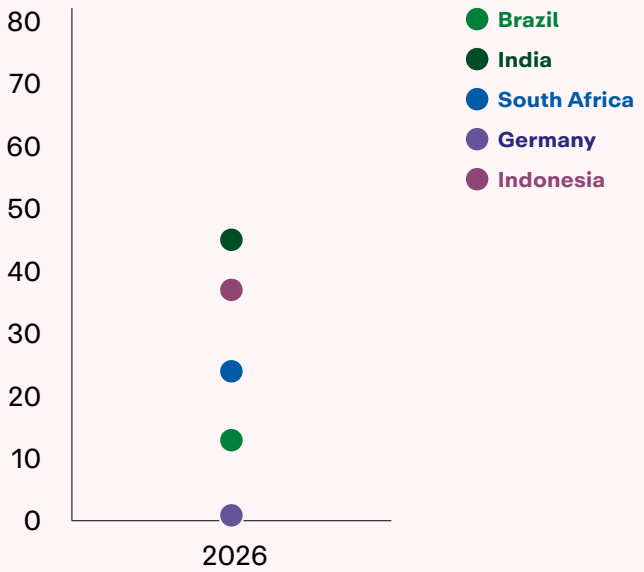
How do you evaluate
China's influence globally?

Respondents: Positive



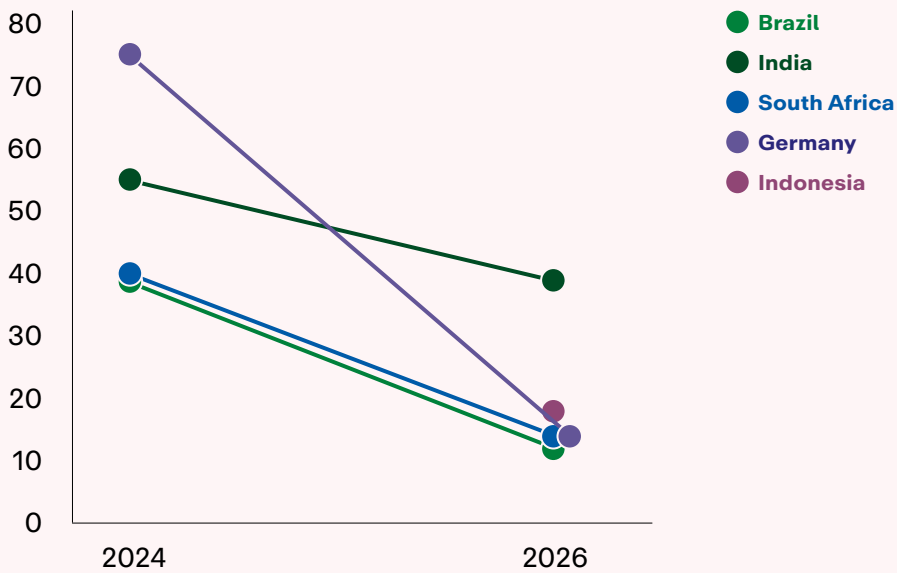
How do you evaluate
Russia's influence globally?

Respondents: Positive



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

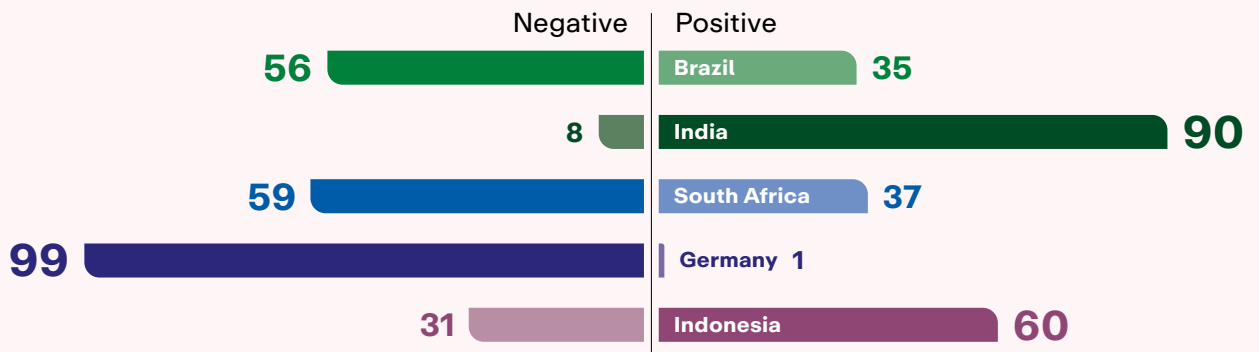
Respondents: Positive



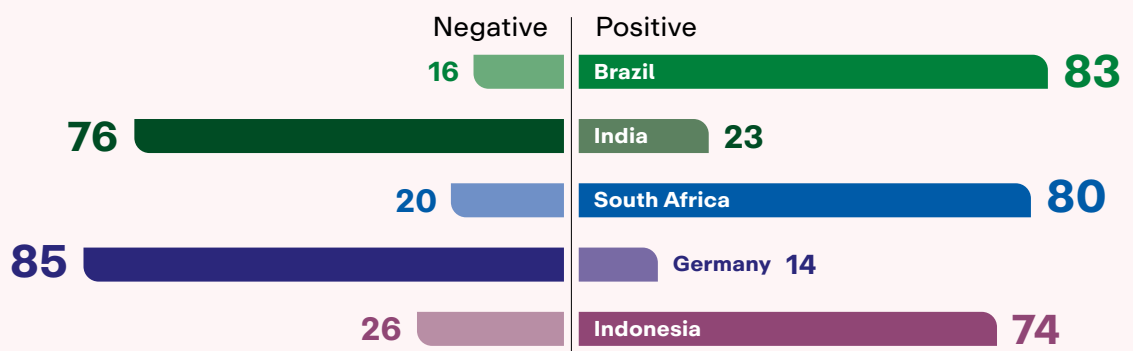
all results in per cent, answer 'don't know' and 'no answer' ranged from 0 to 5 per cent for all issues

Sharp divide on Russia

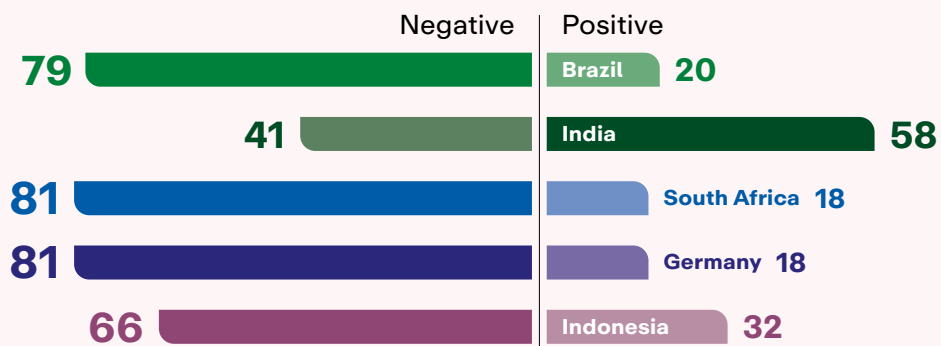
How do you evaluate the influence of Russia in your country?



How do you evaluate the influence of China in your country?



How do you evaluate the influence of the United States in your country?



all results in per cent, answer 'don't know' and 'no answer' ranged from 1 to 9 per cent for all issues

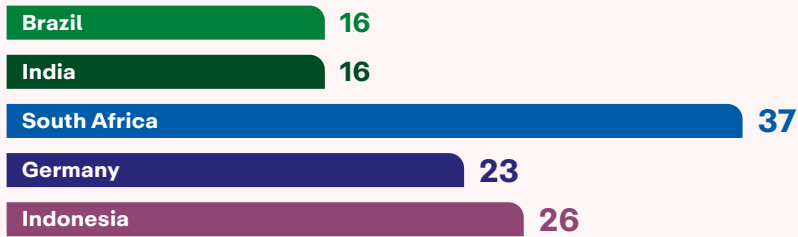
US-China power split

How would you describe the global current distribution of power?

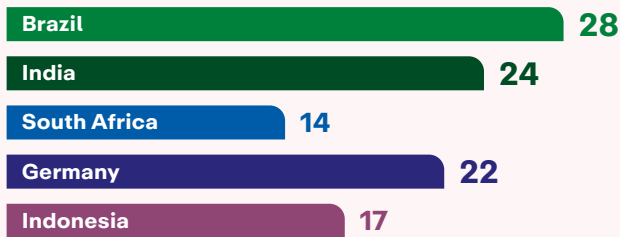
Between the United States and China



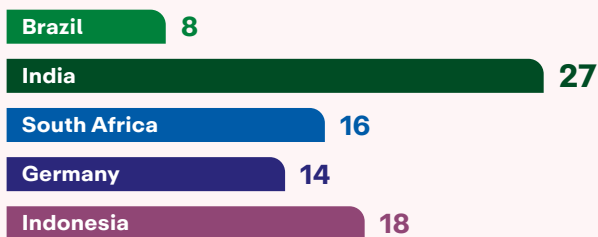
Between many different powers



Between the United States, China and Russia



US-dominated



China-dominated

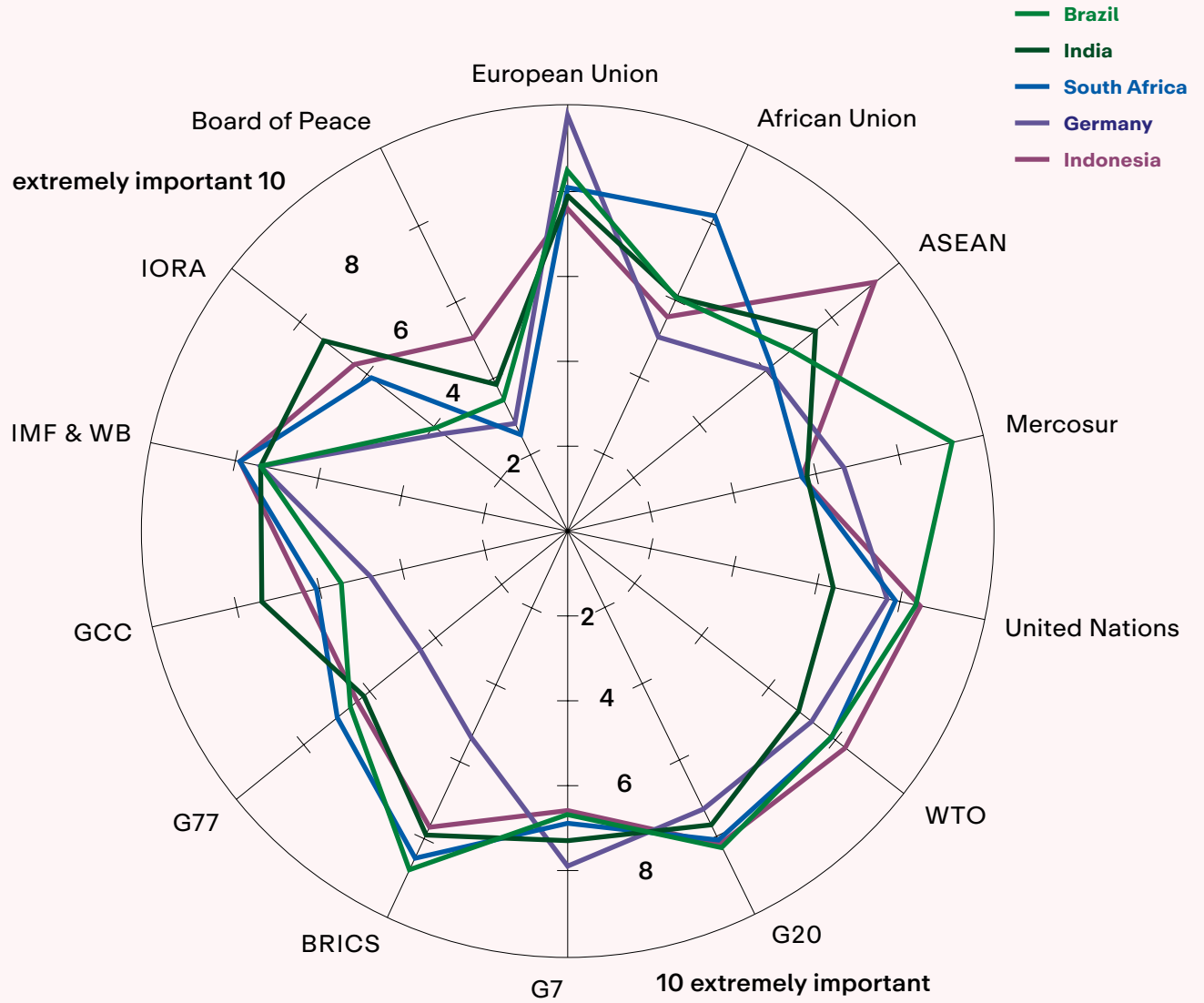


all results in per cent, answer 'don't know' and 'no answer' ranged from 0 to 1 per cent for all issues

International Institutions and Reform

Pivot to regionalism

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

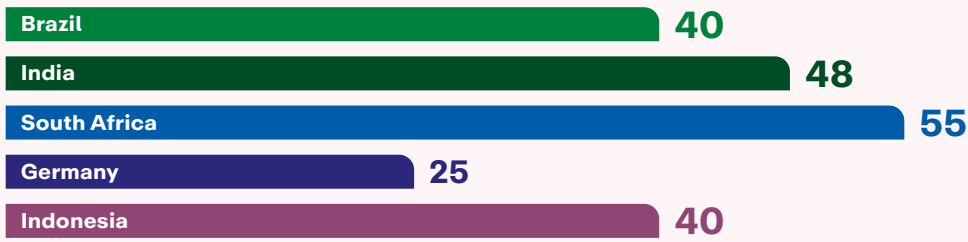


answer 'don't know' and 'no answer' ranged from 0 to 36 per cent for all issues

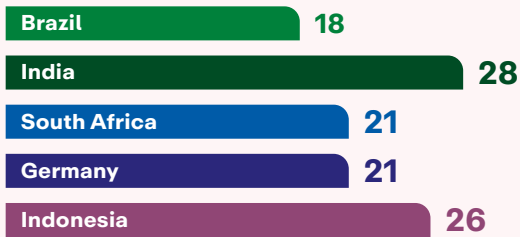
Economic expectations of BRICS

What is your main expectation of BRICS?

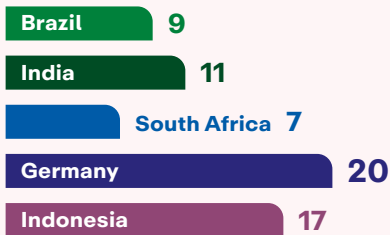
Promoting economic cooperation and growth



Balancing Western countries' influence



Promoting multilateral reforms



Enhancing political influence



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

Reforming the World Trade Organization?

Regarding WTO reform proposals, do you agree with these statements?

Improve member dialogue

Average across all surveyed countries

89

Revive dispute settlement to be binding

Average across all surveyed countries

76

Modernize the rules on industrial subsidies

Average across all surveyed countries

75

Clarify national security exception

Average across all surveyed countries

73

Allow plurilateral agreements without full consensus by WTO members

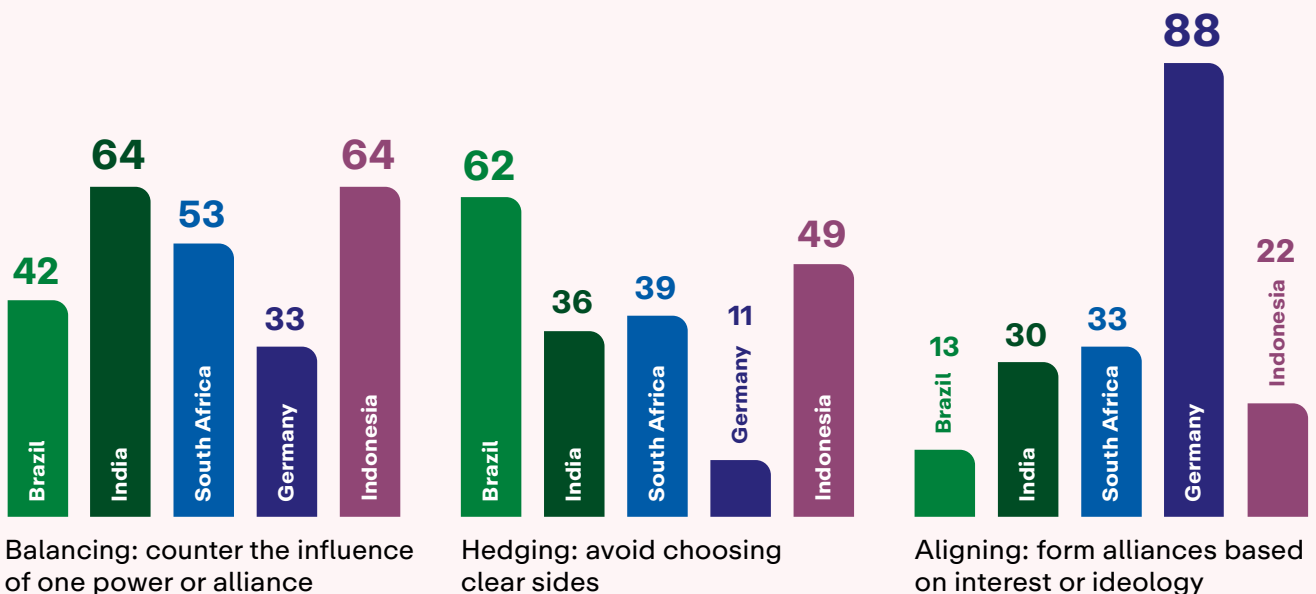
Average across all surveyed countries

64

all results in per cent, answer 'don't know' and 'no answer' ranged from 5 to 14 per cent for all issues

Balancing the powerful

Which of these strategies should your country adopt internationally?



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

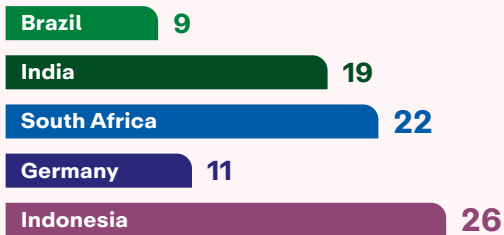
Small groups, big effect

How do you see the future of the international order?

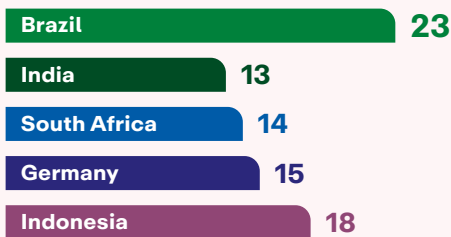
Plurilateral and regional arrangements & small group cooperation



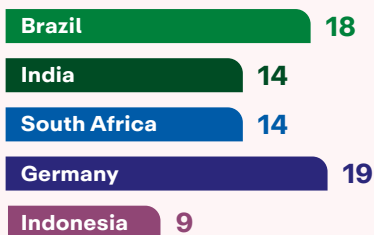
Renewed multilateralism & strong global cooperation



Thin multilateral order & weak global cooperation



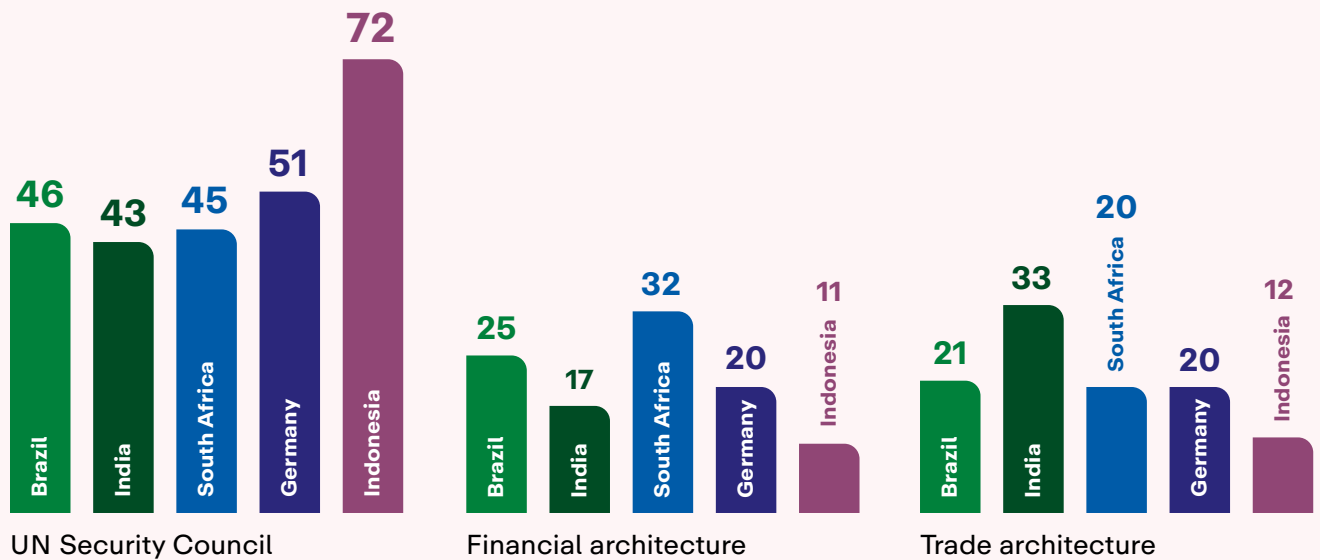
Zones of influence & great powers dominate regions



all results in per cent, answer 'don't know' and 'no answer' ranged from 1 to 7 per cent for all issues

Time for UN Security Council reform

What is the most urgent area for international reform?



all results in per cent, answer 'don't know' and 'no answer' ranged from 2 to 6 per cent for all issues

Middle powers want agency

How should emerging middle powers rebuild the international order?

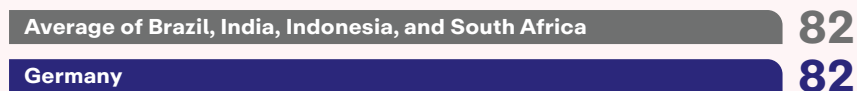
Pushing for global governance reform



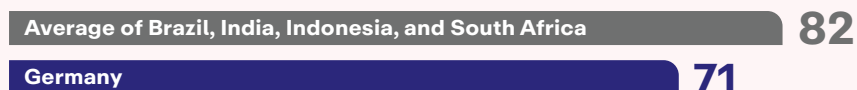
Defending sovereignty and territorial integrity



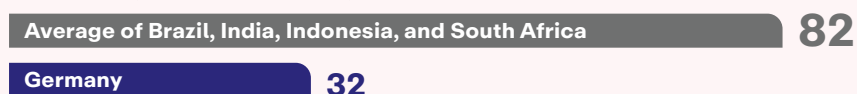
Calling great powers to account



Advancing regionalism



Expanding alternate arrangements like BRICS

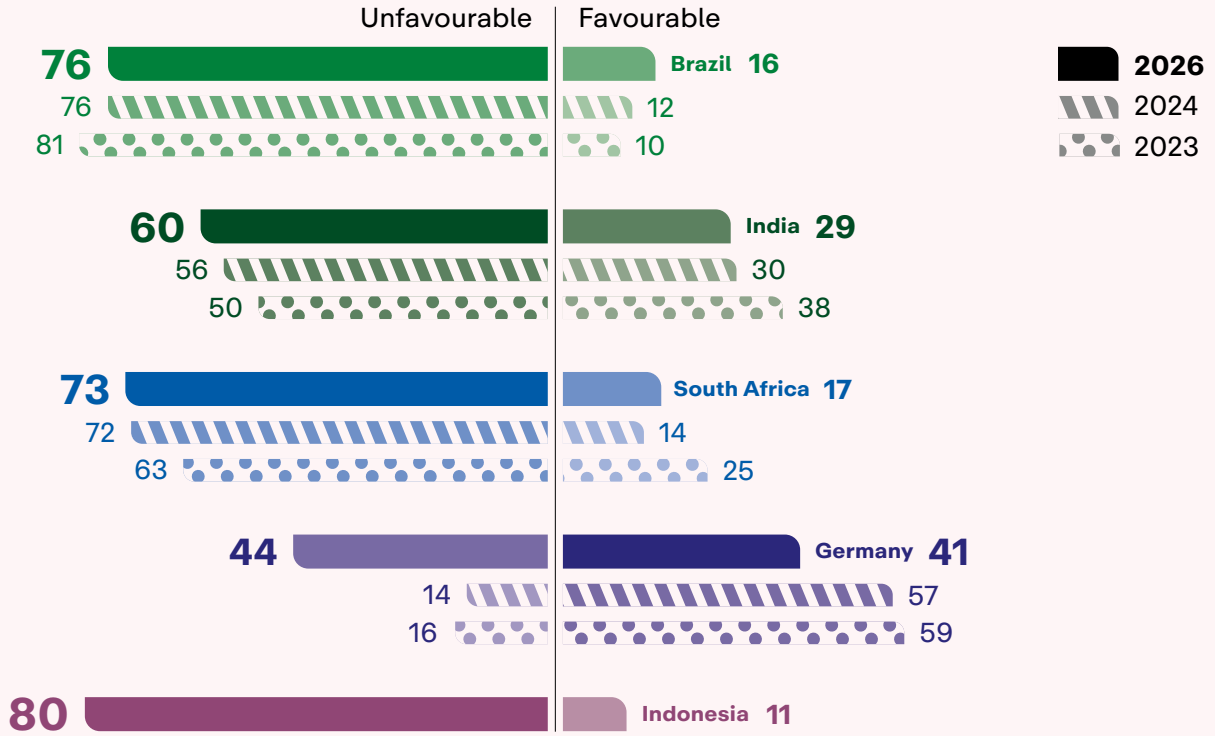


all results in per cent, answer 'don't know' and 'no answer' ranged from 1 to 15 per cent for all issues

Trade and Economic Strategy

Dethroning the dollar?

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

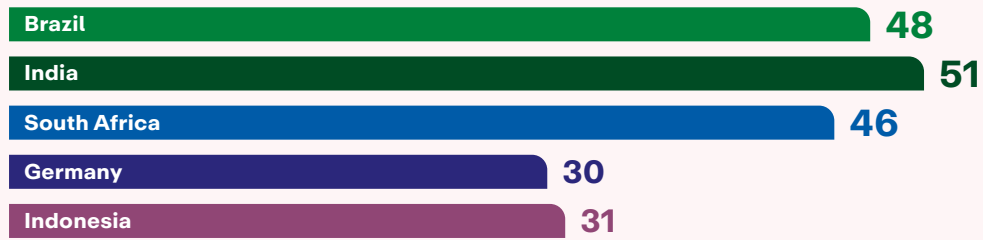


all results in per cent, answer 'no impact' ranged from 2 to 6 per cent for all issues, answer 'don't know' and 'no answer' ranged from 6 to 8 per cent for all issues

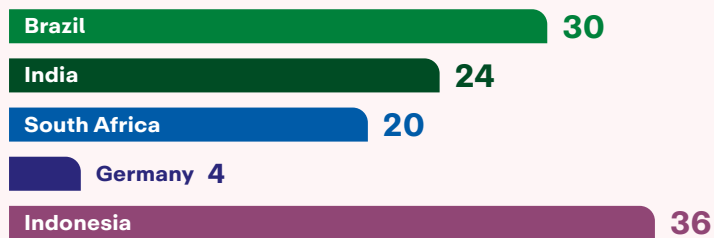
Road to resilience

Which of these strategies should your country prioritize in its supply chains?

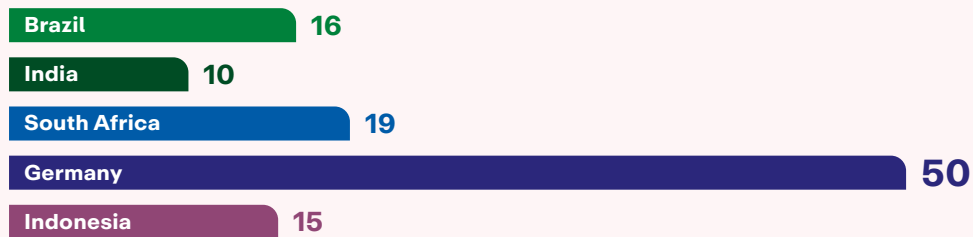
Develop domestic production for critical inputs



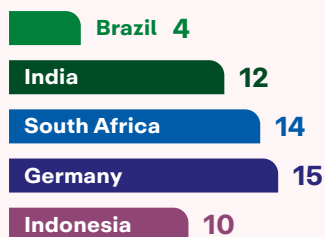
Increase global supply chains integration



Diversify suppliers across multiple regions



Bring production closer to home

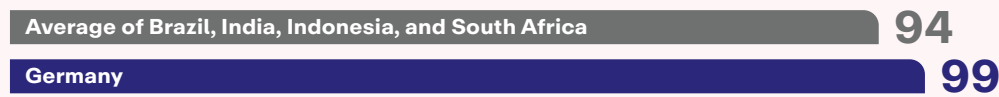


all results in per cent, answer 'don't know' and 'no answer' ranged from 1 to 8 per cent for all issues

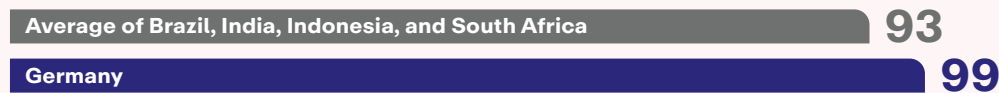
Trade on Germany's to-do list

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

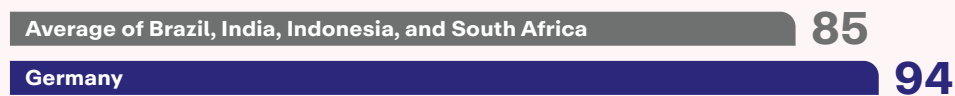
Trade



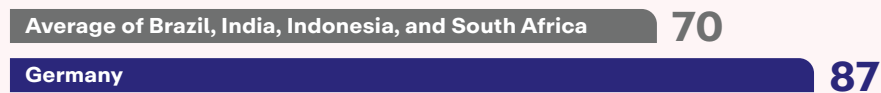
Economic development



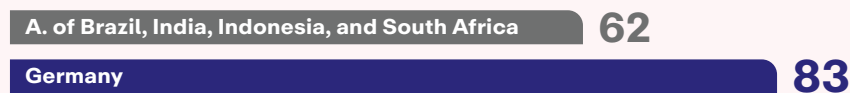
Environmental protection



Democracy promotion



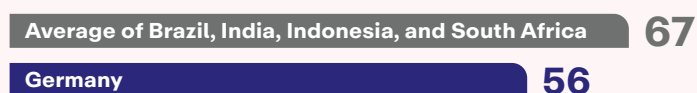
Reform of international institutions



International conflict resolution



Defence



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

South-South technical cooperation

Which contributions should emerging middle powers prioritize for global public goods and development cooperation?

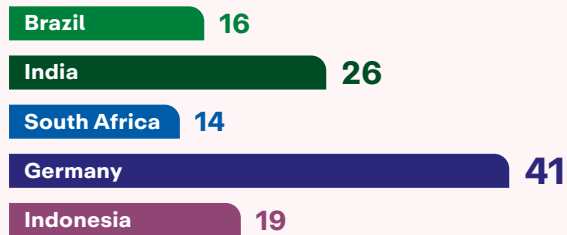
South-South technical cooperation – Sharing skills, expertise and knowledge



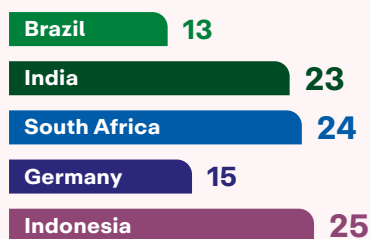
Multilateral and triangular partnerships – Cooperate through international partners



Increased financial contributions – Higher funding to international development and initiatives



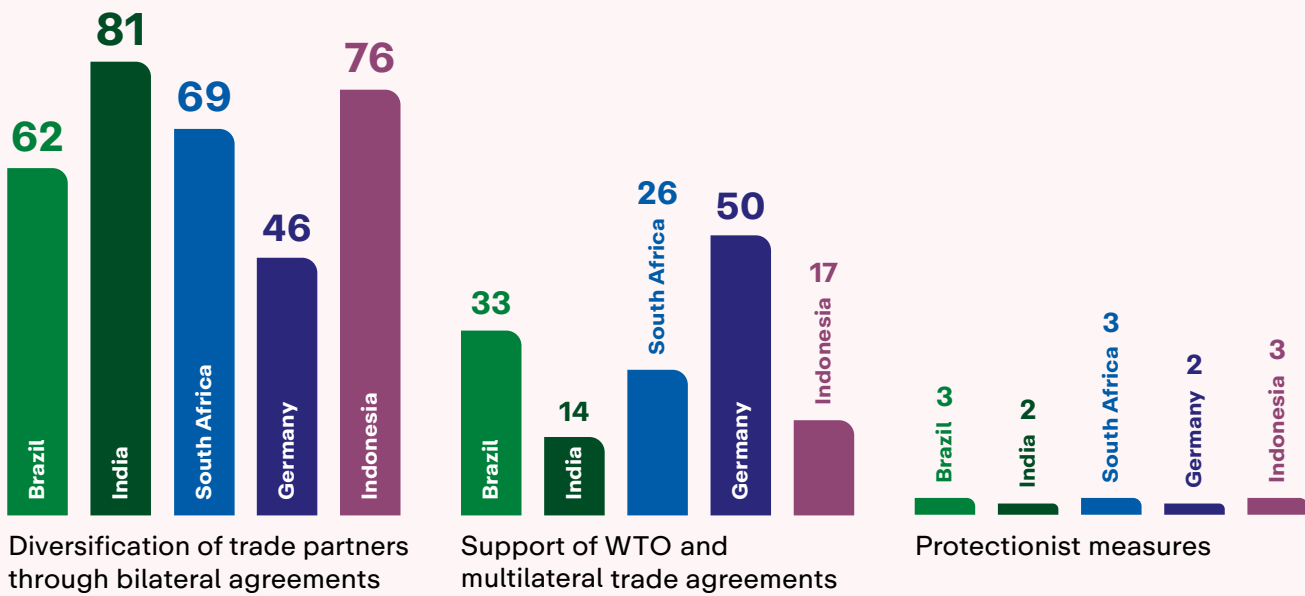
Limited new obligations – Focusing on domestic needs



all results in per cent, answer 'don't know' and 'no answer' ranged from 3 to 6 per cent for all issues

Diversification over tariffs

Which trade approach should your country follow?

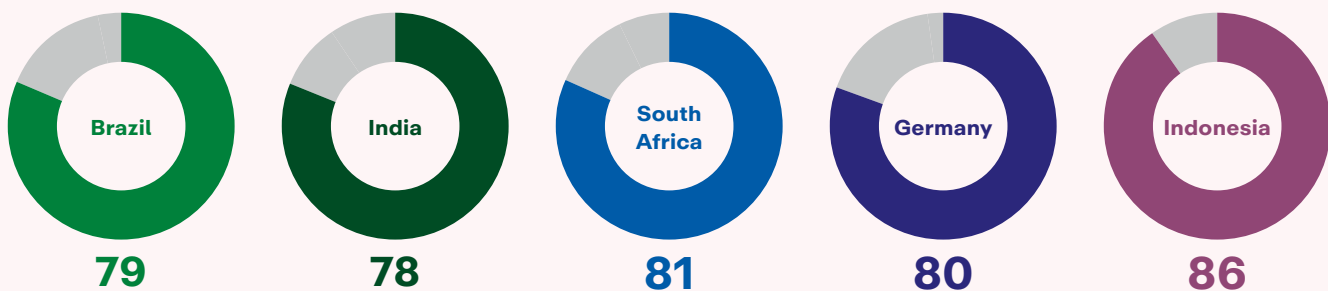


all results in per cent, answer 'don't know' and 'no answer' ranged from 1 to 4 per cent for all issues

Wars and Conflict Management

Escalation expected

Over the next five years, do you think global military conflicts will escalate? Respondents: Yes



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

Methodology

	Brazil	India	South Africa	Germany	Indonesia	
Base unweighted (number of participants)	341	203	153	216	148	
Think tank/academia	48	31	57	35	29	%
Government	33	8	14	22	27	%
Private sector	9	33	7	6	10	%
Civil society (NGO, association, etc.)	5	6	10	18	8	%
Media	2	8	5	9	18	%
International organizations	2	2	3	3	2	%
Parliament	1	1	2	4	3	%
Retired	-	2	1	-	1	%
Other	-	3	1	1	-	%

Base unweighted (number of participants)	341	203	153	216	148	
Foreign policy	34	16	26	49	53	%
Education and research	24	16	31	9	13	%
Economy and foreign trade	16	15	12	12	14	%
Defence and international security	10	15	8	14	6	%
Other	14	26	20	11	11	%

The expert survey was commissioned by the Körber-Stiftung and carried out by forsa Gesellschaft für Sozialforschung und statistische Analysen mbH, between 26 January and 7 April 2026. The interviews were conducted online. The sample is neither representative nor random. The people invited to participate in the survey includes government representatives; members of parliament; the military and judiciary; diplomats; journalists; researchers; senior NGO staff; activists; and private sector representatives from Brazil, India, Indonesia, South Africa, and Germany. Participants were invited individually by the Körber-Stiftung or its cooperation partners in Brazil (BRICS Policy Center), India (Gateway House: Indian Council on Global Relations), Indonesia (Foreign Policy Community of Indonesia) and South Africa (South African Institute of International Affairs). Various methods were used to encourage response, including multiple contact attempts and the incentive of receiving survey results. To ensure that respondents participate twice, each survey link could only be used once. Questions were identical in each country. The survey was conducted in Portuguese in Brazil, in German in Germany, in Hindi and English in India, in Bahasa Indonesia in Indonesia, and in English in South Africa.



Scan the QR code
to access the data.

Not All Middle Powers Want Order



Why middle-power alliances might remain a fantasy. By Seva Gunitsky

Middle powers are in vogue. The much-lauded speech by Canada's Prime Minister Mark Carney at Davos in January called them the new preservers of order. The reasons why are obvious. As the United States abandons the system it built and underwrote, the resulting institutional vacuum has made middle powers newly important. Yet the label of middle power conceals a fundamental fault line between those who want to preserve the order and those who benefit from its destruction.

Looking back, the concept of middle powers has always been slippery. It emerged as a way of describing states that were neither great powers nor small backwaters, but it gradually acquired a normative sheen. For Cold War scholars, they were democratic, multilateralist, and instinctively inclined towards international institutions. Countries like Canada, Australia, and the Netherlands were seen as the responsible adults of global politics.

This was always an imperfect description, but for a few decades it was close enough to be useful. Today, however, a third of middle powers are governed by authoritarian regimes. Their foreign policy has little to do with the benign

multilateralism of the Canadian or Scandinavian type. Turkey, Saudi Arabia, the United Arab Emirates and other middle powers operate under entirely different domestic incentives and global ambitions.

There are two kinds of middle powers today, and the difference between them matters more than what they share. Let us call them builders and hedgers.

‘There are two types of middle powers today: builders and hedgers.’

The builders want to maintain the liberal institutional architecture: modified or without its American engine, but recognizably continuous with the post-1945 order. Canada, Australia, Japan, South Korea, and most EU member states fall into this category. They are building coalitions for supporting Ukraine, holding the World Trade Organization (WTO) together, and investing in the institutional plumbing of global governance. Not out of altruism but because their prosperity and security were built inside this architecture and they have a material interest in its survival.

The problem for builders is that the liberal order was designed to run on US power. Washington provided the security umbrella that allowed Europe and Japan to spend less on defence. It backstopped the financial system and enforced trade rules others relied upon. The builders are attempting something unprecedented: keeping a hegemonic order going after the hegemon has lost any interest in sustaining it.

Hedgers are entirely different. These are states like Turkey, Saudi Arabia, and the United Arab Emirates that are leveraging the transition to multipolarity to extract maximum advantage from all sides. They are opportunistic and not interested in maintaining the liberal order, or any order, since that would require an institutional commitment that they seek to avoid.

‘The risk starts when builders themselves begin to hedge by offering selective support and pursuing strategic autonomy.’

The hedgers thrive in such a transition; a mid-sized state with a strategic location or energy resources can play the field when the United States, China, Russia, and the EU are competing for partners. Saudi Arabia normalizes relations with Israel while deepening ties with China. Turkey sits inside NATO while purchasing Russian air-defense systems. The United Arab Emirates bankrolls Sudanese paramilitaries while maintaining excellent relations with Washington and Beijing. Hedgers want options; they want to be the swing vote and the indispensable partner. This vision makes broad middle-power alliances of the kind Carney envisions harder to create, since hedgers have no incentive to join a permanent bloc.

‘Who pays and who leads? Who takes the risk when coalition commitments are tested?’

Is there enough inertia in the liberal order to keep the middle powers running it without US leadership? The optimistic case rests on institutional stickiness – bureaucracies like the WTO, NATO, and the UN system have decades of entrenchment. To their supporters, their benefits are clear, and the builders have a powerful self-interest in expanding and adapting these institutions. The pessimistic case rests on the free-rider problem. Who pays and who leads? Who takes the risk when coalition commitments are tested?

NATO without the United States is not just smaller; it is a fundamentally different institution in which burden-sharing debates that were irritating under US hegemony become existential. And the problem runs beyond collective action. The hedgers do not share the builders’ outlook and want no part of the alliance that Davos speeches like Carney’s call for. The deeper risk is that builders themselves

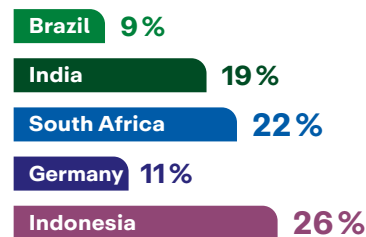
Small groups, big effect

How do you see the future of the international order?

Plurilateral and regional arrangements & small group cooperation



Renewed multilateralism & strong global cooperation



will begin to hedge by pursuing strategic autonomy and offering selective support when alliance commitments grow costly. Coalitions might survive free-riders but not the defection of their core members.

A group of democracies committed to maintaining fragments of the liberal order is still the best path to sustaining what remains of the post-1945 system. But it will be weaker and more contested than the order it replaces. And it will exist in a world where a growing number of middle powers are not interested in saving it but in profiting from its collapse. ↩



Seva Gunitsky

is an associate professor of political science at the University of Toronto.

Workarounding the Superpowers

There is a new playbook for tech middle powers – and it is yielding results. By Laura Mahrenbach and Maximilian Meyer

Canadian Prime Minister Mark Carney's much-commented January 2026 speech in Davos signalled a pivotal change in global affairs: the future would be shaped by middle powers. This middle-power agency goes beyond balancing or aligning with great powers. Instead, today's middle powers are 'workarounding' via small group, interest-led, informal cooperation that excludes China and the United States. This approach allows middle powers to pursue technological advances and security without being locked into the orbit of either Beijing or Washington. It reflects a world where strategic autonomy is prized but difficult to achieve alone, where collaboration is necessary but occurs selectively and outside traditional institutional settings.

Our Tech Middle Power Cooperation dataset shows the 'workarounding moment' occurred three years ago, with a sudden increase in small group,

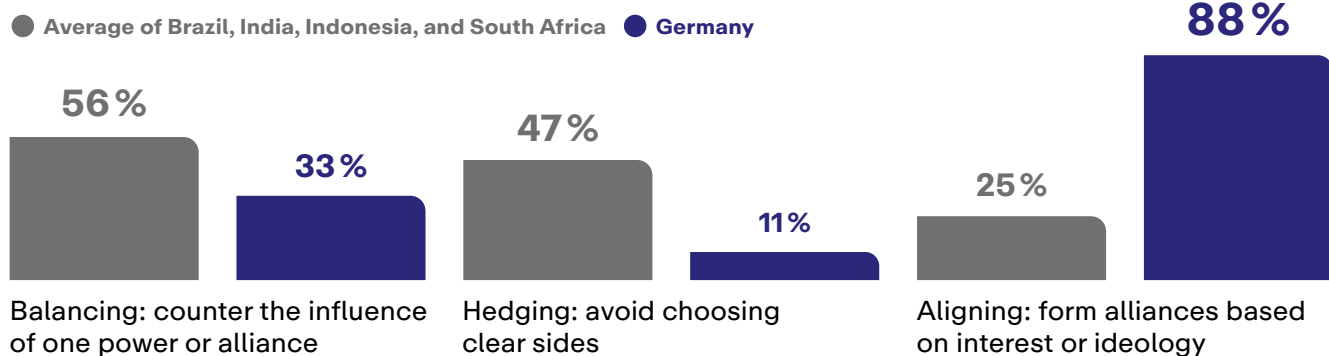
tech cooperation. This workarounding spans the globe but is most prominent in Asia, Europe and the Middle East. It is mostly multi-sectoral, as in the 2023 digitization and electronic manufacturing agreement between India and Saudi Arabia, but single-sector cooperation also occurs, especially in energy, digital innovation and defence. One example is the 2024 nuclear energy cooperation agreement between Czechia and France.

'China and the United States are hardening their spheres of influence in critical domains like AI, quantum computing and space.'

For countries positioned between superpowers and less technologically advanced states like India, Germany, South Korea and the United Arab Emirates, this is a story of adaptation. China and the

Balancing the powerful

Which of these strategies should your country adopt internationally?





United States are aggressively courting partners to secure supply chains and talent while hardening their spheres of influence in critical domains like artificial intelligence (AI), quantum computing and space. Simultaneously, multilateral organizations, long the focus of middle power foreign policy, are floundering. Workarounding provides a way to sidestep superpower coercion, secure multi-issue, short-term gains and enhance national technological capabilities.

‘The question is whether workarounding could be institutionalized.’

The implications of this trend for the global order are not yet clear. One question is whether workarounding could be institutionalized and whether middle powers want it to be. For instance, our research shows middle powers can use this approach to support and develop fledgling multilateral institutions, particularly in the climate and energy transition fields. They may also seek to adopt multilateral techniques in workarounding or multilateralize partnerships and outcomes developed via workarounds.

Yet other evidence suggests workarounding will not always lead to institutionalization because its characteristics – flexible, informal, interest-driven, small – fit better with government needs in areas like defence and space. A recent example is the drone and air defence collaboration between the Gulf states and Ukraine emerging in response to the Iran conflict.

In other areas, the gap between tech middle powers and China and the United States is so large that workarounds may be ineffective in achieving

shared goals. Middle powers cannot match these leaders’ investment, talent or infrastructure in AI and continue to depend on their AI technology. China and the United States will continue to exploit these advantages, whether through market leverage like China’s rare-earth export controls or allegedly win-win initiatives like the US’s Pax Silica.

‘Middle power workarounding will persist because it has already paid off for tech middle powers.’

So workarounding will shape the global order, but not on every issue or location. Middle powers will continue to rely on diverse strategies and adapt these to changing circumstances. Ultimately, the fast-moving techno-political landscape may both reflect and determine which strategies are most effective. For instance, once the hype surrounding large language models has quieted, maybe different types of AI will emerge. Maybe these technologies will result from middle-power workarounding, boosting middle powers’ autonomy and leadership capacity. But maybe they will not, reinforcing the privileges of the AI leaders.

Regardless of how geopolitical and technological contexts evolve, middle-power workarounding will persist because it has already paid off for tech middle powers. Workarounding not only offers the flexibility to adjust to increasingly coercive great-power behaviour. It offers middle powers the opportunity to define the next phase of global order – quietly, flexibly, and on their own terms. ↲



Laura Mahrenbach is adjunct professor at the school of social sciences and technology at the Technical University of Munich.



Maximilian Mayer is professor for international relations and global politics of technology at the University of Bonn.

They co-edited *Workarounding: Tech Middle Power Cooperation in a Turbulent World* (Palgrave Macmillan, 2026)



Middle-Power Test in Central Asia

Kazakhstan and Uzbekistan could turn Central Asia into one ‘collective middle power’. But they might struggle to do so. By Asel Doolotkeldieva and Alexander Wolters

The changing world order is marked by the rise of emerging middle powers. Kazakhstan, with its geographic size and mineral wealth, and Uzbekistan, with its large population and central location, are seeking this status. But this requires a regional vision in which Central Asia can grow into effectively a ‘collective middle power’.

‘Kazakhstan and Uzbekistan need a clear path for Central Asia to become more internationally relevant.’

The two countries’ aspirations are not unfounded. The importance of Central Asia has been growing since the full-scale invasion of Ukraine as well as with the search for new transport routes linking China and Europe. The global competition for sustainable supplies of critical raw materials has further elevated the status of the region, of which Kazakhstan and Uzbekistan are by far the largest

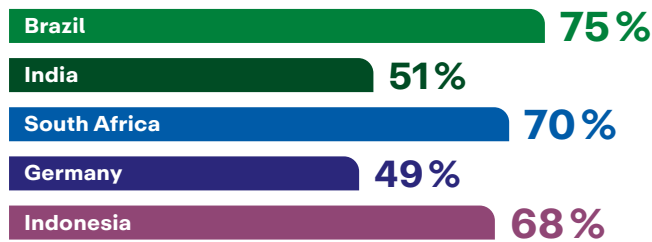
economies. Kazakhstan’s ‘multi-vector’ foreign policy allowed its first president, Nursultan Nazarbayev, to cultivate positive relationships with Russia, China and the West simultaneously while avoiding dependence on any major power. Uzbekistan takes a similar approach under President Shavkat Mirziyoyev.

However, both countries need a vision about a path for Central Asia to become more internationally relevant. The Middle Corridor makes this possible. It represents a grand connectivity ambition with Central Asia at the centre, joining all edges of the Eurasian landmass together. The two countries’ economic prospects look good, with Kazakhstan growing by 6.5 per cent and Uzbekistan by 7.7 per cent in 2025. This supports the regional momentum. However, they are also in dire need of investment into their own domestic energy systems, critical infrastructures, and water-supply networks.

South-South technical cooperation

Which contributions should emerging middle powers prioritize for global public goods and development cooperation?

South-South technical cooperation – Sharing skills, expertise and knowledge



The overarching goal of the Middle Corridor is to better connect East and West through Central Asia, which will enable the region's states to integrate their resource-driven economies into global supply chains. It is on track to handle more than 11 million tonnes of cargo annually by 2030. Port facilities on the Caspian and Black Seas are being further developed, investments in railways and roads are being implemented, and various consortiums aim to harmonize customs and transport regulations along the corridor. From a broader regional perspective, the Middle Corridor is part of a multi-directional network for moving goods not only from east to west, but also from north to south and from south-east to west.

‘The Middle Corridor aims to better connect East and West through Central Asia.’

The Central Asian states must still address several challenges, however. First, they must prioritize infrastructure development over situational geopolitical interests. The renewed interest in the Middle Corridor was prompted by the invasion of Ukraine, but the EU and China might pivot away under new international developments and leave this infrastructure project in its nascent stage. Second, integration into global supply chains will only materialize if the region's extraction-based economies become processing and refining hubs. Third, profits from the successful exploitation of the Middle Corridor and the modernization of the extractive industries must be managed transparently. The likes of the Extractive Industries Transparency Initiative have repeatedly highlighted the opaque nature of financial operations across the region's extractive industries.

This issue is crucial for ensuring that, fourth, Central Asia's populations approve its emerging role as a major interconnector and source of critical raw materials. Otherwise, the region risks social instability that could undermine its development

and modernization agenda. Fifth, materializing this grand vision should not come at the price of environmental destruction. The development of the Middle Corridor is unfolding against the background of extreme fragility of the ecosystems surrounding the Caspian Sea and of the Soviet history of harmful extraction.

Sixth, regional cohesion is necessary. The recent unprecedented foreign-policy convergence of the Central Asian countries, reflected in the regular meetings of their heads of state, shows willingness to move collectively towards intra-regional connectivity. Yet, if only Uzbekistan and Kazakhstan as the region's undisputed leading economies benefit from the Middle Corridor, their rise as middle powers will be at risk from competition from the other regional states.

Offering a strategic vision for acting as one region, unified and meaningfully integrated, can help Uzbekistan and Kazakhstan project their emerging power. The history of previously failed efforts at cooperation shows the challenge of regional cohesion is real.

In addition, in the absence of stable succession frameworks in each country, their authoritarian regimes will need to manage power transitions without destabilizing regional dynamics. As citizens in Central Asia hardly feel the positive effects of the economic growth today, due to insufficient redistribution that fails to compensate for high inflation, authoritarian succession remains a source of danger.

Whether or not the two leading states in Central Asia will manage regional challenges in a collaborative rather than competitive manner will eventually decide if it can emerge as an independent geopolitical actor and a collective middle power. ↯



Asel Doolotkeldieva is a research fellow at the University of Potsdam.



Alexander Wolters is an independent scholar.

Holding the Line on Climate

With the United States and the European Union scaling back, can middle powers step up to safeguard climate progress before it is too late?

The fragmented post-unipolar period we are experiencing allows middle powers to play a more active role in global climate politics. While they are unlikely to replace great-power leadership, they could stabilize and broker climate multilateralism, bridging divides across negotiating blocs and generating momentum on specific issue areas where great-power rivalry has produced paralysis.

Such a role is needed because the current geopolitical context is damaging global climate action. The United States under the Trump administration is undermining the global climate agenda while the European Union is scaling back its climate ambitions amid the rise of the far right and heightened security anxieties. China appears less focused on multilateralism, prioritizes commercial interests and shows little willingness to lead in global climate governance.

To prevent climate policy from becoming a casualty of this great-power fragmentation, middle powers must move beyond symbolic diplomacy towards governance provision. The push by Australia and Turkey to host COP31 in November 2026, together with the relatively strong nationally determined contribution score of countries such as South Korea and Mexico, suggests that this argument has merit. However, these signals alone will not make a meaningful difference unless middle powers work collaboratively in negotiations.

For example, Turkey and Australia could help break the current deadlock on the ‘transition away from fossil fuels’ agenda by building bridges between developed, developing and fossil fuel-producing countries. In climate finance, Turkey could propose a ‘climate vulnerability and transition window’ for middle-income countries, allocating concessional climate finance based on combined vulnerability, debt stress and transition need rather than income alone. This requires being less transactional, not seeking to maximize gains narrowly filtered through national interest, and committing

to a multilateralism grounded in long-term credibility, trust in implementation and acceptance of short-term costs for diffuse collective gains.

Whether middle powers can act in such a way depends less on their diplomatic ambition than on their capacity to convert visibility into governance provision. It requires to skillfully build coalitions across negotiating divides, the material resources to support implementation and the political will to accept the costs of sustained climate action. If middle powers merely use forums such as COP31 to enhance their international profile, their contribution is likely to remain symbolic. ↗



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Ümit Şahin

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What Is Non-Alignment? What Is Multi-Alignment?

There are various interpretations of the terms non-alignment and multi-alignment. This brief explanation is intended to provide a general overview rather than a fixed definition.

Non-alignment, as understood during the Cold War, was essentially about values and visions of the global order, and rejecting both the Western and Eastern blocs while seeking to preserve independence, resist colonial influence and promote collective self-determination. The ‘non’ in the term was a deliberate choice made by the leaders of the Non-Aligned Movement.

Multi-alignment is often described as the new face of non-alignment. However, the two concepts represent fundamentally different approaches in international politics. While non-alignment emerged from an ideological and collective political project, multi-alignment reflects a more pragmatic response to today’s fragmented geopolitical landscape. Multi-alignment is often understood as a hedging strategy – an adaptive approach suited to an increasingly multipolar world.

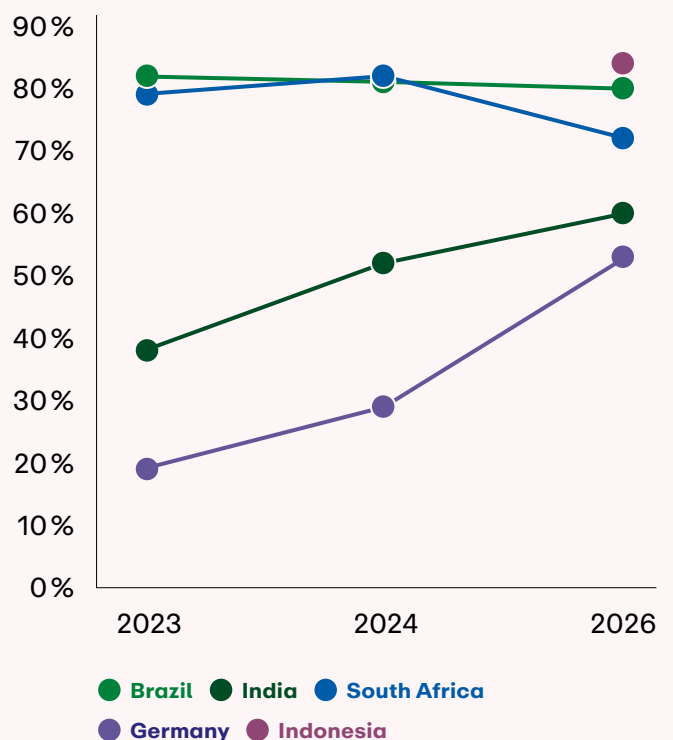
Today, more of the world is attuned to the spirit of the Bandung conference of 1955 than ever before: nearly three-quarters of countries can be described as non-aligned – or multi-aligned (see our *Bandung at 70* publication). States are vigorously defending their sovereignty and, at least in principle, racial equality is widely accepted, as is the rhetorical commitment to a more equal distribution of power among states.

At the same time, the meanings and political implications of non-alignment and multi-alignment differ across the five countries surveyed in this publication.

Germany: Latecomer to non-alignment

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

Neutral/non-aligned



Scan the QR code to read our publication
Bandung at 70: Multilateralism in a New Era of Multi-Alignment.

We Want True Agency

African middle powers are joining forces in ways that matter, but an outdated global financial system is still holding them back.
By Frannie Leautier

African middle powers such as South Africa, Nigeria, Kenya and Egypt are expanding their economic and diplomatic footprint, but their growing financial capacity is a necessary but insufficient condition for power. True agency requires a move beyond reacting to global shifts and three fundamental transitions.

African middle powers must move from access to capital to control over capital. Financial sovereignty involves deepening domestic capital markets and institutional investor bases so that policy is not hostage to external liquidity cycles and conditionality. This transition is already underway. Domestic bond markets in countries like South Africa and Kenya are expanding, with pension funds and insurers increasingly financing governments in local currency. This is reducing foreign-exchange risk and anchoring more stable funding. Sovereign wealth funds, such as that of Egypt, are evolving from passive reserves into strategic co-investors in infrastructure and industry. At the same time, large domestic savings pools such as national social security funds are gradually being redirected to support long-term, productive investment. The trajectory is clear: these are early but decisive steps towards domestically anchored capital systems. If we scale and better coordinate them, they have the potential to shift African economies from price-takers in global finance to rule-shapers.

‘Kenya and Egypt are building energy partnerships that transfer technology and capability investments.’

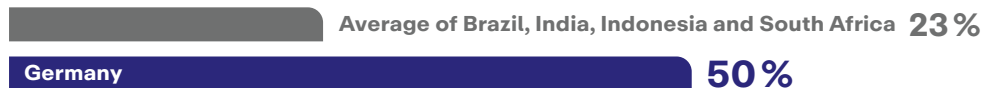
There must also be a shift from participation to agenda-setting in multilateral institutions. The latest Körber Emerging Middle Powers report shows that experts in many emerging middle powers support reforming global governance. Rather than simply seeking a seat at the table, African middle powers must act collectively through the African Union, the G20 and reformed multilateral development banks to reshape rules on debt, climate finance and global public investment. They are not just talking; they are already acting. Nigeria and South Africa are collaborating on critical minerals development rather than competing at the margins. Kenya and Egypt are building energy partnerships that transfer technology and capability. Investments in resilient energy and digital ecosystems are positioning these four countries not just as end-markets but also as nodes in emerging global industries. The move is gradual, but it reflects a clear intent to capture more value domestically and regionally.

To match the scale of Africa’s needs, we also need to move development finance from project financing to platform solutions that crowd in capital at scale, such as guarantees, blended finance and pooled procurement mechanisms. This is where

Diversification over tariffs

Which trade approach should your country follow?

Support of WTO and multilateral trade agreements



Diversification of trade partners through bilateral agreements



reform of multilateral development banks is pivotal: we need to optimize balance sheets, to share risk and to mobilize capital rather than just deploying it.

These shifts are necessitated by the deep-seated structural asymmetries in the global financial architecture. Dissatisfaction with institutions like the International Monetary Fund and UN Security Council is not abstract for Africa; it directly shapes our fiscal space, how we access capital, and our ability to act strategically rather than reactively.

‘Flexibility must translate into coherent continental positioning under the African Continental Free Trade Area.’

The Emerging Middle Powers Report 2026 highlights that middle powers are no longer passive actors in a bipolar world; they are active shapers of a more plural, negotiated global order. It also reveals a defining feature of middle powers: strategic autonomy. Rather than aligning rigidly, they prefer flexible, issue-based coalitions. African middle powers are particularly adept at this, engaging across BRICS, the G20 and Western partnerships. This flexibility must now translate into coherent continental positioning under frameworks such as the African Continental Free Trade Area.

‘A shift towards agency is already underway – not as a grand redesign, but through incremental moves.’

Kenya’s designation as a major non-NATO ally, South Africa’s convening power through its G20 presidency and Egypt’s role as a bridge between Africa, the Middle East and Europe illustrate a more assertive approach to global engagement. Rather than siding with one bloc, these countries are increasingly navigating multiple partnerships simultaneously, leveraging competition among global powers to advance their national and regional priorities.

Taken together, these examples show that the shift towards agency is already underway – not as a grand redesign, but through practical, often incremental, moves. The challenge now is to deepen these transitions and scale them into systems that can sustain real economic and geopolitical power.

Geopolitical agency is not granted; it must be built. By aligning financial architecture, institutional voice and investment platforms, Africa’s middle powers have the demographic weight, market potential and diplomatic credibility to shape the next phase of global order. ↩



Frannie Leautier
is senior partner and CEO of SouthBridge Investments.

‘Look At the Substance of Our Work’



More people need more jobs. World Bank Managing Director Anna Bjerde knows how to create them and help build trust in the World Bank.

Körper-Stiftung: Ms Bjerde, you’ve identified job creation as a top priority for the World Bank. Why is it centering its mission on labor markets now?

Anna Bjerde: Because we are facing a historic demographic surge. Over the next 15 years, 1.2 billion young people will enter the labour market, but we expect only 400 million jobs to be created. That gap poses a massive development challenge. Jobs are the unifying priority across our diverse client base, from low-income countries needing basic opportunities to advanced economies where technological change is disrupting labour markets.

How do you practically close a gap of 800 million jobs?

We approach it through three foundational pillars: building core infrastructure such as energy and transport and also education, health and nutrition systems and service delivery, creating an enabling environment where businesses can invest and grow, and mobilizing private capital through mechanisms like guarantees.

What else?

On top of that, we are targeting five key sectors. Infrastructure, which forms the backbone of any developing economy. Agriculture, more specifically

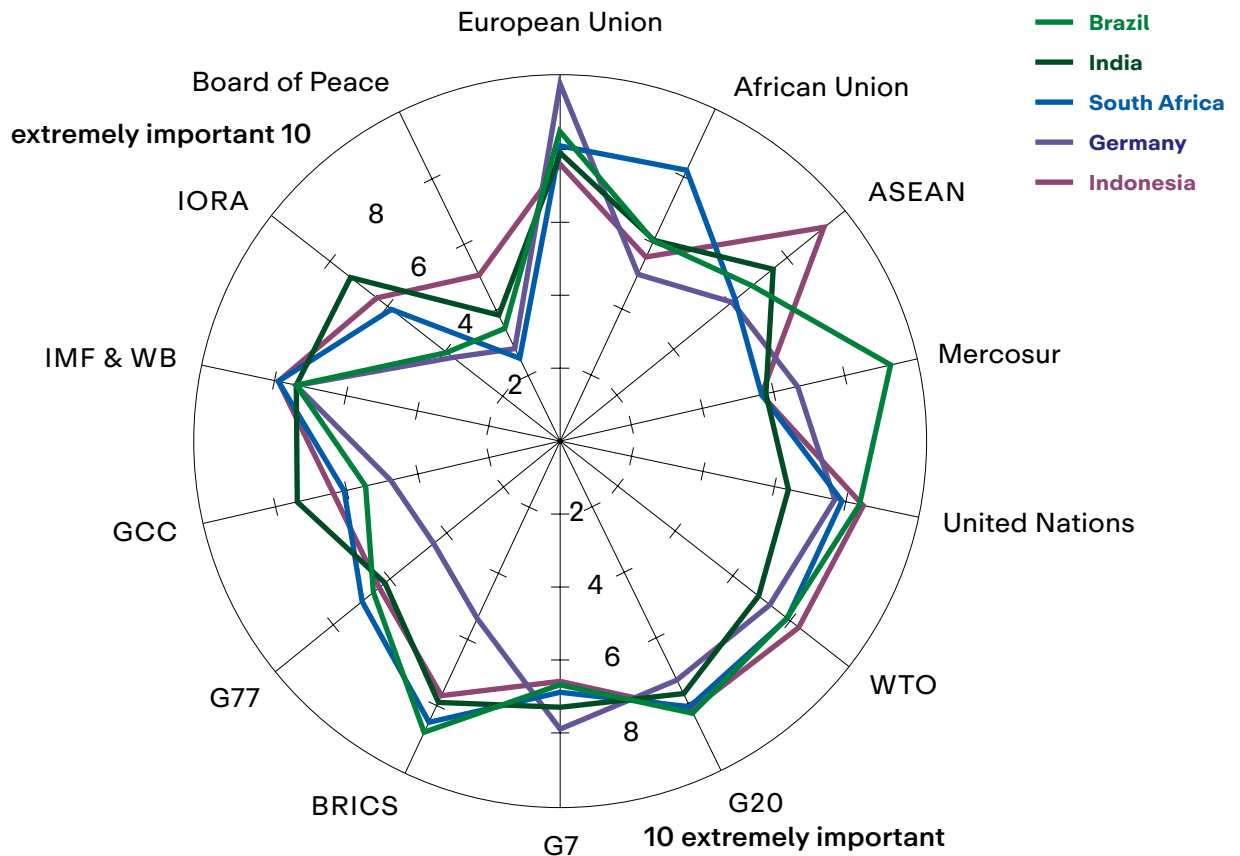
agribusiness, given that about two-thirds of people in low-income countries still depend on the sector, yet its productivity remains low. Health, which is not only essential for strong human capital, but is also a major source of employment through the growing care economy. And of course, tourism can be a powerful driver of upward mobility within the services sector. Value-added manufacturing is also crucial because it helps countries move beyond raw resource extraction towards deeper economic transformation where jobs are created locally.

You haven’t mentioned mobilizing private capital. What is the World Bank’s role there?

It starts with the basics. Investors won’t come if there are unreliable energy, weak digital infrastructure, or massive skills gaps. A big part of our job is helping governments fix these foundational constraints. Beyond the hard infrastructure, investors need predictability – clear rules and stable regulations that don’t shift frequently and with political change. We help de-risk projects through the Multilateral Investment Guarantee and invest in private sector development through the International Finance Corporation. One important point: the private sector isn’t just global corporations. It’s local small and medium-sized enterprises. They

Pivot to regionalism

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



create the majority of jobs, and their ability to scale is critical. When firms grow, more jobs are created.

Emerging middle powers frequently criticize the World Bank's 'DNA' – its structure and priorities as too Western. How do you respond to that?

I understand the perception, but I would encourage critics to look at the substance of our work. Our country's strategies aren't dictated from Washington. They start with a simple question: what does the country want to achieve? We then respond where we can add value. Today, two-thirds of our concessional financing goes to Africa. Middle powers like Brazil and India are shaping their own development agendas, and we support them as partners in that journey. We should be judged by what we deliver on the ground.

But the criticism is often about who sets the rules. Do your frameworks reflect a too Western-centric perspective?

No, we've evolved. Development and climate are now inseparable; nearly half of our financing supports climate-related goals, not because of targets but because investments in things like resilient infrastructure and multimodal urban transport systems make good development sense. We prioritize

evidence-based outcomes, whether that's learning results in education or practical energy solutions. In some cases, that may include financing natural gas if it's the most viable path to energy reliability for a partner. In practice, I see less ideological tension and more demand for a partnership that connects global experience with local contexts.

In a fragmented world of debt distress and energy shocks, what is the World Bank's unique value proposition?

We are a 'connective tissue'. With 80 years of experience, we can connect countries like Indonesia or Brazil so they can share their own development experience with others. No single institution can solve today's overlapping crises alone, which is why partnerships are now central to our operations and that includes a strong emphasis on bringing knowledge to our clients but also sharing their knowledge with other countries. ☞

The interview was conducted on 28 April 2026 by Dr Sarah Pagung and Leona Harting.

Anna Bjerde

is managing director of operations at the World Bank.

The Körber Emerging Middle Powers Initiative

The aim of our Körber Emerging Middle Powers Initiative (KEMP) is to promote dialogue between Germany and emerging middle powers, such as Brazil, India, Indonesia and South Africa. With their growing political, economic and demographic weight, emerging middle powers are key players in addressing global challenges. At a time when the world appears to have rediscovered bilateralism as its dominant operating logic, their role in fostering international cooperation and strategic alignment has never been more significant.

Against this backdrop, the initiative conducts an annual expert survey and facilitates various dialogue formats in cooperation with Gateway House: Indian Council on Global Relations, the BRICS Policy Center in Brazil, the South African Institute for International Affairs (SAIIA) and this year's newcomer, the Foreign Policy Community of Indonesia (FPCI). Through these activities, the initiative contributes to a deeper understanding of the geopolitical perspectives of emerging middle powers.

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Remembering Steven Gruzd

We dedicate this report to our dear friend and colleague Steven Gruzd, who passed away in March. Steven was a wonderful person: warm-hearted, empathetic and deeply valued by the KEMP team. He was an excellent colleague and a brilliant thinker, and his humor often caught us delightfully by surprise.

We are grateful to have known him and to have worked alongside him. Steven made important contributions to this and previous reports, as well as to the project as a whole. Our thoughts and deepest sympathies are with his family, friends and all those who were close to him.



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