

Center for Strategic and International Studies

TRANSCRIPT

Event

“Rising States, the Global South, and Great Power Competition”

DATE

Tuesday, December 2, 2025

CSIS EXPERTS

Jon B. Alterman

Zbigniew Brzezinski Chair in Global Security and Geostrategy

Lily McElwee

*President and CEO, Phoenix Committee on Foreign Relations;
Adjunct Fellow (Non-resident) Freeman Chair in China Studies, CSIS*

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Jon B. Alterman: A lot of us grew up in a world where the United States called a lot of the shots. That's been true less and less. Countries have conflicts, and how they compete and how they fight matters. What we're seeing more and more is that the rules are getting weaker, and that means the United States can find itself in more conflicts around the world. I'm Jon Alterman, the Brzezinski Chair in Global Security and Geostrategy at the Center for Strategic and International Studies.

Lily McElwee: I'm Lily McElwee. I'm the President and CEO of the Phoenix Committee on Foreign Relations and a non-resident fellow in the Freeman Chair in China Studies at CSIS.

Dr. Alterman: Lily and I were working on a project on global order, and we came to the project from different places.

Dr. McElwee: We certainly did, Jon. I remember we talked about this when we first met. I'd moved to China as a seventh grader—a very, very jolting move for a seventh grader—at a very different time in U.S.-China relations, a very different China. I remember much about that time. It gave me an appreciation for what the U.S. stands for—our cultural influence, the freedoms that we enjoy at home. But it also gave me a sense that much of the world does not see things the way we do in the United States, and I think that's a perspective and an observation that we first bonded over.

Dr. Alterman: I came to this having studied the Middle East, traveled in the Middle East, and lived in the Middle East for more than 30 years. And it was my sense that as we did this project, so much of the work was focused on U.S. perceptions and European perceptions, and there was a large part of the world that we really weren't paying enough attention to. That part of the world has changed a lot, and let me give you an example of exactly how. In 1990, when I was in graduate school, the United States and other wealthy countries—the OECD—represented about 80 percent of global gross domestic product, and the rest of the world represented about 20 percent. If you look forward to projections for 2030, it's no longer the United States and its partners representing 80 percent. Instead, their share has gone down to half—about 40 percent—and the rest of the world will represent 60 percent of global gross domestic product.

Dr. McElwee: Global power balances are undoubtedly shifting, and the real manifestation of this for Washington and many capitals in the West has

been watching the evolution of the BRICS grouping, which has grown from a term used to describe five developing economies to an organization that's increasingly taken on geopolitical heft—real or perceived—and captured global attention through its growth. It has added many observer nations in recent years and more formally brought on new official members. Jon and I set out to understand why these nations—rising powers in their own right—are increasingly interested in joining the BRICS, but more broadly, increasingly identifying as part of a “global South.” While this term has been around for some time, only in recent years have we seen it adopted at scale by emerging powers—in statements by their leaders to domestic populations and international audiences, in statements of groupings such as the BRICS and the Shanghai Cooperation Organization, and others. China and Russia clearly use the term and seek expanded multilateral groupings to peel off countries in the West. We know that members of the global South share dissatisfaction with the way things are—the current global order and current power structures. But beyond that dissatisfaction, we sought to ask: What else unites them? What do they want, and how do they want to get there?

Dr. Alterman: We thought the first thing you have to do is understand where countries are coming from. And the way to understand where countries are coming from is to do expert studies on the countries that matter. We looked at Mexico, Brazil, South Africa, Saudi Arabia, the United Arab Emirates, Turkey, India, and Indonesia. Why these countries? Partly because these are countries that matter. Many of them are members of the G20, among the 20 largest economies in the world. They're not members of the G7—that club of democracies close to the United States, the wealthiest countries in the world. These countries tend to be regional powers. They tend to be deeply integrated in trade within their regions, and they tend to be deeply integrated in trade with the United States, with China, and with Russia. And the more we thought about these countries, Lily and I said, these countries are the ones that will help lead how different regions of the world are going to treat the United States, China, and Russia. They're the ones who will determine whose rules matter—do rules matter? And the only way to understand what they're doing individually is to study them individually. So we commissioned papers from experts to look at these countries: How do they see their history? How do their economies work? How do they see their future? What do they think about security, and what do they think gives them security?

Dr. McElwee: What we found was a key commonality among these states—which we are calling “hinge states” because of their regional importance—is that they share a sense of precarity and urgency, balanced with a sense of agency. Across the reports, we found that while these countries differ in wealth, political orientation, cultural heritage, history, and even interests—and while they approach the global order from different perspectives with shared gripes but different origins of grievance—they see global South framing and the solidarity it creates as a pathway toward boosting their geopolitical weight.

Dr. Alterman: That’s partly driven by their domestic politics. It’s interesting to look at their domestic politics. All of these countries have important domestic politics—increasingly volatile—even authoritarian countries where they don’t have elections. But in many ways, not having elections means the leaders have to have an even better sense of where the public is. Leaders feel a need to stay in power, and they feel it’s harder and harder to stay in power. They need legitimacy. There’s something about the country’s rising role on the world stage that gives them legitimacy, and that helps drive how they see these issues. As we looked at this, it felt to us like populism was actually a decent frame—the sense that the world is divided into a mass of people exploited by a small number of people. It’s simple: it’s about an attitude of getting what you deserve, getting your rights. The good thing about using a populism frame is that democracies are good at dealing with populist movements. They accommodate populist movements. They speak to populist movements. They give people a stake in their future. And that’s a way we thought you could begin to address the claims from these rising economies around the world—who want to address what they see as historic injustice and historic disenfranchisement.

Dr. McElwee: That frame really helped us think about policy implications and policy recommendations. As the United States looks at a more complex world and seeks to engage effectively with the global South, it makes sense to focus on these hinge states, given their positions of power in regional organizations, supply chains, transportation lines, and their ability to use their economic and military might to steer regional affairs. So we thought: How can Washington most effectively engage these hinge states? And we came up with five recommendations. The first and second are intimately connected. We recommend that Washington build ad hoc coalitions—small, flexible partnerships that can deliver results on real priorities of these states. Concrete priorities in the climate sphere, health, technology, connectivity. And there’s an

emphasis on tangible here. It's important to speak to the real interests and priorities of these states and collaborate where the United States has the ability to help. This not only helps engage these hinge states where it matters for them, but by engaging these powerful regional actors in small groupings, the United States can deepen its bilateral relationships, build shared interests, and build patterns of cooperation that can be applied across other domains.

We also think the United States should offer better incentives. As someone who has studied China for a long time and is familiar with the Chinese approach to foreign affairs—categorizing countries by “strategic partnerships,” “comprehensive partnerships,” “all-weather partnerships”—we recognize that often, from Beijing’s perspective and from the perspective of countries on the other end, these terms mean very little. But they do point to a partnership hierarchy that might hold some relevance for the United States in terms of creating clear tiers of partnerships with meaningful benefits for closer ties with the U.S. and consequences for strained ones, while remaining open to cooperation overall. And I think the key here is adaptability—as behavior evolves and relationships evolve—and being willing to prune or pare back relationships when ties deteriorate.

We also think it's important for Washington to support a democratization of global institutions. We've talked about how these states share grievances about power structures in the international system. We know that permanent membership of the UN Security Council, for example, has been static for decades. We think Washington would do well to recognize the increasing role and responsibility of these countries by promoting a democratization of international institutions, which would also bind them more closely to norms and principles the United States supports.

Finally, we think it's important for the United States to improve its messaging. One reason China and Russia promote the idea of the global South is that it allows them to join many countries around the world in embracing a future very different from the past—and in doing so, erode the power of the United States and its closest partners. Washington should push back on this idea and adapt its messaging in this environment—highlighting how partnership with the United States advances fairness and shared prosperity, and adopting a more inclusive framing that recognizes the rising role and responsibility of these hinge states.

Dr. Alterman: It seems to us that the United States isn't really a status quo power. The United States is constantly reinventing itself; it's constantly reinventing its relationship to the world. The United States, more than any other country, is committed to developing human capital. And it's our sense that understanding that we are a country that has always been about the future—and helping align with other countries, communicating to them that we still are their best bet for the future they want—is a way to bring these countries around. We're not holding them down; we're helping lift them up. The alternative to having these countries on our side, working with us to reform the international system, is a breakdown in the international system—where the bigger a state is, the more it can get away with. That kind of world would be a lot more violent and a lot poorer than the world we have now.

Dr. McElwee: Absolutely. And one point that I think is really important, which came out of our research, is that in an environment of limited resources for diplomacy and foreign policy, U.S. attention can be targeted. The United States can engage a wide swath of nations in the global South more effectively by focusing its attention on these eight hinge states. This will do more than win over a certain set of middle powers; it will also help align entire regions, given the centrality and leadership roles of these countries. So the best way to secure the future is really to bring along these eight hinge states.

Dr. Alterman: It's our sense that the Trump administration already sees some of this. Of the eight countries we studied in our report, four of them—Turkey, Indonesia, Saudi Arabia, and the UAE—were part of the Trump administration's effort to move forward on a Gaza peace agreement. I think they have a sense that these countries really do have weight, that they bring others along. And that's important because they help legitimize what the United States is doing. But it's not all good news. We have increasing conflicts, especially over trade with India and with Brazil. Given how important we think these countries are in their regions and in the world, finding ways to manage some of those differences is very, very important. We have a special interest in winning these countries over and getting their buy-in on a world based on predictable rules—where they have a voice—to help preserve a world where we all can prosper.

To learn more about our study and our conclusions, please look at the report at [csis.org](https://www.csis.org). Thank you.

(END.)