

# Policy Insights

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## Whose Middle Power Moment? The Global South and the Coalition Question

THAÍS DÓRIA & GUSTAVO DE CARVALHO

African perspectives  
Global insights

# Executive summary

In January 2026, Canadian Prime Minister Mark Carney called on middle powers to act as agents of a new international order. He ruled out a return to the pre-Trump status quo and proposed ‘variable-geometry’ coalitions for middle-power cooperation. The speech did not specify whom it was addressing. Read narrowly, as a message to the label’s conventional Western references framing, it offers little to Brazil, South Africa or Indonesia; read broadly, it assumes a coherence among middle powers that does not exist. These three states, used as case studies in this policy insights, are not variations on a shared type. Brazil is as a global player, South Africa is a pivotal power on the continent and pursues normative ambitions of its own, and Indonesia anchors ASEAN while dealing with competing regional arenas. Each has a distinct form of influence not captured by the conventional ‘middle-power’ category: leverage over strategic resources at the producer end of supply chains, agenda-setting through consecutive Southern G20 presidencies and norm entrepreneurship conducted outside alliance frameworks. The conceptual vocabulary Carney presents as new already exists in traditions the speech does not reference, including Latin American autonomy theory, Bandung and the Non-Aligned Movement. Cooperation among these states rests on shared interests rather than shared identity, which is a pattern that has held across changes of government and shifting regional configurations. The implication runs in both directions: Northern middle powers must recognise that their historical position is not the category itself, and Southern ones must ensure that their engagement reflects their actual roles rather than externally imposed categories.

## Introduction

In January 2026, Canadian Prime Minister Mark Carney declared a ‘rupture’ in the international order and called on middle powers to forge a ‘third path’ between great power rivalry and subordination.<sup>1</sup> The speech’s central claim was not about material power but moral agency: ‘[T]he power of the less powerful starts with honesty.’ Middle powers, Carney argued, could intervene by refusing to comply with a system that no longer delivers by ‘naming reality’ rather than reproducing fictions of mutual benefit. Danish Prime Minister Mette Frederiksen, among other European leaders, offered her immediate endorsement; commentators at the Carnegie Endowment declared it a ‘middle power moment’.<sup>2</sup> Yet the phrase was not new. There had been talk of a middle-power moment in Rabat, Jakarta and other capitals for years before Davos. Carney thus gave a diffuse mood its sharpest articulation rather than originating it.

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1 Mark Carney, “Special Address” (Speech, World Economic Forum, Davos, January 20, 2026).

2 Stewart Patrick, “The Middle Power Moment” (Carnegie Endowment for International Peace, January 2026).

The claim that naming reality is a form of power aligns with a growing body of scholarship on how states without dominant material capabilities – ie, military power, economic strength, technological superiority and geographic advantages – shape the international order through rhetoric.<sup>3</sup> However, the speech does precisely what it critiques: it describes a reality from a particular position and presents that naming as universal. States' responses to the speech were determined by their position within the order the speech claimed to describe neutrally.

## The speech does precisely what it critiques: it describes a reality from a particular position and presents that naming as universal

This policy insights argues that the current middle-power debate – as set out in Carney's address but evident across a wider and earlier set of proposals<sup>4</sup> – conflates structurally different types of states. In doing so, it obscures the distinct interests, strategies and sources of influence of Global South middle powers.<sup>5</sup> What it presents as order-building is better understood as foreign policy recalibration for a specific category of state: wealthy, Western-aligned and adjusting to the decline of US hegemonic guarantees. The instruments it invokes, from NATO Article 5 and the European single market to the G7 and a proposed bridge between the Trans-Pacific Partnership and the EU, presuppose existing alliances and a particular reading of the fracture.

The fracturing of the multilateral order is not in dispute. The World Trade Organization's (WTO) dispute settlement mechanism has been incapacitated since 2019. UN Security Council reforms remain blocked. The governance structures of Bretton Woods institutions do not reflect 21<sup>st</sup>-century economic realities. Anxiety about the continuity of US-led institutions, the assertiveness of revisionist powers, and the costs of weaponised interdependence have led to renewed interest in middle-power coalitions. Less settled, however, is the diagnosis of rupture itself. From many vantage points in the Global South, the order now said to be fracturing was always biased in its membership, selective in its application and contested in its legitimacy. What seems like a recent breakdown from within the alliance system is viewed from outside it as the intensification of an asymmetry that was present from the start. This is a point that Bandung and the Non-Aligned

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3 Sasikumar Sundaram, *Rhetorical Powers: How Rising States Shape International Order* (Columbia University Press, 2026); Thaís Dória, "The Theory of Discursive Agency: Middle-Tier States, Hierarchy, and the Politics of Self-Positioning" (PhD thesis, University of Warwick, forthcoming).

4 See Policy Centre for the New South, *2025: The Year of the Middle Powers* (PCNS, 2025); Foreign Policy Community of Indonesia, "Middle Powers Strategic Dialogue: Program Background", May 8, 2025.

5 See J.C. Scott, *Weapons of the Weak: Everyday Forms of Peasant Resistance* (Yale University Press, 1985); Connor O'Brien and Quah Say Jye, "Middle Powers Can't Run the World" (Lowy Institute, 2026); "A Middle Powers Club Would Make the World More Dangerous", *Foreign Policy*, March 2026.

Movement – as well as decades of campaigning for a fairer trade and financial system – made long ago. Carney’s speech brought the issue into the spotlight but, while he appeared to speak to a shared audience, it is not clear who that audience is.

For states in the Global South that occupy different positions, exercise different forms of influence and answer to different audiences, the ambiguity matters. The speech addresses middle powers, but that category encompasses structurally different types of states. Treating them as a single entity obscures how these states operate and what they seek. Cooperation in this wider category is therefore unlikely to rest on a shared identity and is more likely to emerge around specific, issue-based alignments.

## The speech addresses middle powers, but that category encompasses structurally different types of states

The situation is not symmetrical. For Northern middle powers, it means recognising that the category has widened. For those in the Global South, it means recognition of their distinct contribution to middle-power practice rather than a departure from a Northern template.

Brazil, South Africa and Indonesia are used as case studies because of both their differences and their areas of overlap. Each is situated in a different world region, has recently chaired the G20 and performs a distinct role as a global player, a continental power and a regional broker. This also explains why states often grouped with them are not discussed here: India operates at a scale closer to that of a great-power aspirant than to that of a middle power; Turkey is a NATO treaty ally; and Nigeria has yet to convert its continental weight into G20 agenda-setting. This policy insights first examines what the conventional middle-power category fails to capture about Global South countries such as Brazil, South Africa and Indonesia. It then examines how these states exert influence and perform their roles, before looking at cooperation among middle powers when category-based partnerships fail and at what makes it work. The conclusion returns to Carney’s address and sets out what a broader middle-power category asks of policymakers at both ends of the spectrum.

## What the conventional middle-power concept misses

The middle-power concept was built around a particular kind of state. Canada and Australia are the textbook examples. Both are wealthy, embedded in the postwar liberal order and associated with multilateral coalition-building, mediation and support for the

alliance system that underpinned it. The concept described what these states did and, in effect, endorsed it: they were constructive participants in an order whose maintenance served their interests.

Extending the label beyond this core group is not straightforward. Applied to Global South states in particular, it compresses fundamentally different relationships into a single category. This tension has been debated for over two decades, with scholars questioning the utility of treating middle powers as a coherent group.<sup>6</sup> Scholarship in the Global North, drawing on the Canadian and Australian experience, has tended to define middle-power behaviour in terms of a diplomatic style of multilateral coalition-building, mediation and good international citizenship that, in practice, supports the order from which these states benefit. Work rooted in the Global South has been more sceptical, defining such states instead by their position within international hierarchies and by a reformist rather than order-maintaining disposition. In particular, the conventional binary that casts Western middle powers as conformist and Southern ones as reformist has long been under strain, as both groupings exhibit more ambivalent and context-dependent behaviour in a shifting order.<sup>7</sup> Middle-power behaviour is thus better understood as the assertion of distinctive roles rather than as variations within a single category. Contemporary policy discourse fails to consider this point sufficiently.

## The conventional binary that casts Western middle powers as conformist and Southern ones as reformist has long been under strain

This becomes apparent in an examination of how Brazil, South Africa and Indonesia engage with the category. Brazil has historically refused the label, positioning itself as a 'global trader' or 'global player'. This position is evident in its decades-long campaign for permanent UN Security Council membership and its investment in IBSA (India, Brazil and South Africa) and BRICS as parallel South–South architectures. In addition, it can be seen in its normative entrepreneurship, which ranges from 'responsibility while protecting' and 'sustainable development' to the 2010 Tehran Declaration. The framing throughout is one of reform demands and normative leadership, not 'middle' status.

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6 J. Robertson and A. Carr, "Is Anyone a Middle Power? The Case for Historicization", *International Theory* 15, no. 3 (2023): pp. 379–403.

7 E. Jordaan, "The Emerging Middle Power Concept: Time to Say Goodbye?", *South African Journal of International Affairs* 24, no. 3 (2017): pp. 395–412; B. Süssler & C. Alden, "Brokering Peace: Emerging Middle Powers, Agency and Mediation", *Global Policy*, 2025; C. Efstathopoulos, "Global IR and the Middle Power Concept: Exploring Different Paths to Agency", *Australian Journal of International Affairs* 77, no. 2 (2023): pp. 213–232; J De Bhal, "Rethinking 'Middle Powers' as a Category of Practice: Stratification, Ambiguity, and Power", *International Theory* 15, no. 3 (2023): pp. 404–427.

South Africa uses the term selectively. As one senior official put it, South Africa ‘punches above its weight’ in international affairs, not because of economic or military power but because of ‘political influence’ grounded in its post-apartheid transition. This is a claim to exceptionalism, not a ‘middle-power’ status.<sup>8</sup> Indonesia only adopted the term in its national development plan under the previous administration of president Joko Widodo, while continuing to anchor its foreign policy in the distinct tradition of *bebas aktif* (independent and active). This latter principle predates and echoes the legacies of the Bandung Conference and the Non-Aligned Movement.<sup>9</sup>

The resistance to this label is significant: they show that the concept, when conventionally deployed, does not capture how these states understand themselves. Any framework built on an unexamined ‘middle power’ category is based on incorrect assumptions. Indeed, what Carney describes as a recent decision to ‘take the sign out of the window’ has, for these states, been baseline diplomatic practice for four decades.

The recent G20 presidencies illustrate how these positions translate into practice. Brazil’s 2024 G20 presidency turned its global-player role into an agenda: the Global Alliance Against Hunger and Poverty, with 148 founding members, the introduction of billionaire taxation to the G20 agenda and a renewed push for Bretton Woods reform.<sup>10</sup> The alliance positioned Brazilian social policy – *Bolsa Família* and the Food Acquisition Programme – as exportable global models. This is not the agenda that buyers’ clubs or ‘like-minded’ technology partnerships were designed to advance.

South Africa’s 2025 G20 presidency, the first held by an African country, placed critical minerals within a framework of inclusive growth and industrialisation rather than supply-chain security. It also established an Extraordinary Committee on Global Inequality and secured a leaders’ declaration despite the US boycott.<sup>11</sup> The reframing of critical minerals – moving away from a ‘pit-to-port’ extraction model – serves South Africa’s industrial strategy while raising questions among other African states about whether the move reflects continental priorities or national positioning.<sup>12</sup>

Indonesia’s 2022 G20 presidency, assumed weeks before Russia invaded Ukraine, illustrated the bridge-building role under pressure. Indonesia refused Western demands to exclude Russia, insisted that the G20 was ‘an economic and development forum’ and produced a leaders’ declaration. It also situated the Pandemic Fund as an institutional mechanism.<sup>13</sup>

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8 Senior South African official, interview with author, Johannesburg, 2025.

9 On Indonesia’s adoption of the middle power concept, see M.F. Karim, “Middle Power, Status-Seeking and Role Conceptions”, *Third World Quarterly* 39, no. 2 (2018).

10 Government of Brazil, “Brazil’s President Lula Launches the Global Alliance Against Hunger and Poverty Alongside 148 Members”, Press Release, November 2024.

11 “G20 Summit in South Africa Adopts Declaration Despite US Boycott”, *CNN*, November 22, 2025.

12 Peter Fabricius, “On Paper, It Was Africa’s G20”, *ISS Today*, November 2025.

13 G20, “Bali Leaders’ Declaration”, November 16, 2022.

But this diplomatic practice is now being asked to reconcile increasingly incompatible demands. Examples include Indonesia's 2024 maritime memorandum of understanding with China, which can be understood as a concession through its use of 'overlapping claims' to describe waters Jakarta had long treated as an exclusive economic zone, and its January 2025 accession to BRICS. This, along with its critical minerals trade deal with the US, signals an expansion of arenas.<sup>14</sup>

Brazil, South Africa and Indonesia thus occupy distinct roles, grounded in different historical trajectories and directed at different audiences. None maps onto the alliance-partner role that is taken as a given in the conventional description of a middle power. They do not so much deviate from a Northern template as make a distinct contribution to what middle-power diplomatic practice can be. These roles also encompass forms of engagement that the conventional category does not capture. Carney's 'variable-geometry coalitions' (flexible, issue-specific alliances) will have to engage these if they are to do the work the speech wants done.

## Modes of engagement: Global South middle powers

The broader middle-power category makes visible modes of engagement that the conventional category obscures. Strategic autonomy is the obvious example. What it means depends on what autonomy is being exercised from and toward what. For states such as Brazil, South Africa and Indonesia, autonomy operates under different structural conditions than in Canada, Australia or the UK, and viewing them through the same lens produces a thinner account than the moment requires.

Their answers – diversifying dependencies, building regional coalitions, cultivating issue-specific bargaining capacity and engaging multilateral institutions selectively – anticipate much of what is now presented as innovation

Latin American autonomy theory provides the longer historical context. Almost 50 years ago, Hélio Jaguaribe and Juan Carlos Puig posed the question Carney now raises: how can states in subordinate positions expand their ability to manoeuvre within constraining

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<sup>14</sup> P. Manggala, "Indonesia's Bold Step Into BRICS and Beyond", East Asia Forum, February 4, 2025.

international structures?<sup>15</sup> Their answers – diversifying dependencies, building regional coalitions, cultivating issue-specific bargaining capacity and engaging multilateral institutions selectively – anticipate much of what is now presented as innovation.

Similarly, the Bandung Conference, the Non-Aligned Movement and decades of South–South cooperation predate the rediscovery of ‘variable geometry’. For the states examined here, this has been standard practice, as their positions do not allow full integration on terms set elsewhere.

Four forms of engagement are pertinent to this context. The first is producer-state influence. Critical minerals diplomacy is a clear example. Indonesia’s 2020 ban on raw nickel-ore exports was aimed at spurring downstream investment and reducing its role as a raw-material supplier.<sup>16</sup> The policy carried high costs, including WTO disputes initiated by the EU. Yet it also showed Jakarta’s position of leverage: it can bear those costs as it controls roughly half of the world’s nickel reserves.

South Africa occupies a comparable position in platinum group metals, although it is constrained by its deeper integration into global financial markets and reliance on foreign direct investment in mining. Within South African policy circles, even the terminology is contested. Minerals Minister Gwede Mantashe put the point directly: ‘America defines [critical minerals] in terms of the role in the defence system ... in Africa, it should have a different meaning.’<sup>17</sup> The category ‘critical minerals’ encodes the consumer-state position. Producer states operate on a different question: how to extract maximum developmental value from resources that the energy transition has made strategic.

South Africa’s 2025 G20 reframing of critical minerals, noted earlier, was a producer-state move.<sup>18</sup> By contrast, Carney’s proposal for buyers’ clubs anchored in the G7 treats the same issue as a matter of supply security to be managed through coordinated procurement. The two agendas are not complementary, but neither are they structurally incompatible. A variable-geometry coalition that viewed producer-state and consumer-state agendas as parallel rather than nested would differ considerably from one based solely on buyers’ clubs.

The second is agenda-setting through institutional rotation. Four consecutive G20 presidencies held by Global South states – Indonesia in 2022, India in 2023, Brazil in 2024 and South Africa in 2025 – illustrate this dynamic. Each used the platform differently, and India added a focus on digital public infrastructure to the development, hunger and critical minerals agendas. As a result, there has been a visible shift in the institution’s

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15 See H. Jaguaribe, “Autonomía periférica y hegemonía céntrica”, *Estudios Internacionales* 12, no. 46 (1979): pp. 91–130; J.C. Puig, “Doctrinas internacionales y autonomía latinoamericana” (Instituto de Altos Estudios de América Latina, Universidad Simón Bolívar, 1980). See also Sean W. Burges, *Latin America and the Shifting Sands of Globalization* (Routledge, 2017); A. Tickner and D.L. Blaney, eds., *Thinking International Relations Differently* (Routledge, 2012).

16 S. Strangio, “Indonesia to Appeal WTO Ruling on Nickel Export Ban”, *The Diplomat*, 2 December 2022.

17 Gwede Mantashe (address, Investing in African Mining Indaba, Cape Town, February 2025).

18 G20 South Africa, “Critical Minerals Framework”, 2025.

centre of gravity, achieved not through formal reform but through sustained agenda-setting from positions outside the G7 core.<sup>19</sup>

In a more fragmented order, this kind of agenda-setting becomes an important source of influence – and one that differs from how Carney’s middle powers operate. Canada, Australia and the UK have tended to work within institutional frameworks designed by others. The four-year arc from Bali to Johannesburg shows what becomes possible when Global South states hold the G20 chair in sequence and use it to sustain continuity across changing political contexts. This is a distinct mode of agency rather than a departure from a Northern template.

The third is the enforcement of norms. South Africa’s engagement with the International Court of Justice is one example. Anchored in continental and non-aligned constituencies rather than G7 or NATO networks, it pressures the international legal order to uphold the universal principles it claims to defend. Brazil’s long-standing calls for reforming multilateral institutions are another example. From Brazil’s then president José Sarney’s 1985 address to the UN General Assembly to the country’s 2024 G20 push for Bretton Woods reform, it has consistently demanded that these institutions live up to the principles they profess to serve: sovereign equality, broader representation and the democratisation of global decision-making.

**These states also engage the order through language, pointing out asymmetries and giving alternative accounts of how the system works**

These states also engage the order through language, pointing out asymmetries and giving alternative accounts of how the system works, which is a mode of influence available to states that lack dominant material capabilities.

However, much of this influence is only possible because intensifying competition between the US and China has reopened room for manoeuvre that a more unipolar moment had closed off. And while producer-state leverage relies on China being an alternative buyer and financier, this does not negate the agency it describes. The traditional autonomy of these states always existed within structural constraints, and the aim should be to widen the margin of manoeuvre. The bigger risk is that reliance on China becomes a new form of dependence. This tension is already visible in Indonesia’s nickel relationship and Chinese demand for African minerals.

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<sup>19</sup> O. Stuenkel, “Brazil Sees Opportunity in a Multipolar Order”, in L. Vinjamuri, ed., *Competing Visions of International Order: Responses to US Power* (Chatham House, March 2025).

Overall, these forms of engagement suggest that the claim to agency at the centre of Carney's address requires a wider frame than what the speech provides. The relevant group of states is broader than it assumes, and the ways they exercise influence are more varied than its proposals allow. If category-based partnerships can no longer perform the expected coordinating work, the more pressing question becomes what cooperation among middle powers looks like in practice.

## What works: Convergence-based engagement

Carney's address refers to 'variable geometry' and coalitions of 'partners who share enough common ground to act together'.<sup>20</sup> This is a more accurate description of the status quo than older accounts that treat middle-power cooperation as flowing from shared identity within a coherent category. The question is where this common ground is presumed to sit. In Carney's framing, it is upstream, among 'like-minded democracies' from which coalitions are assembled, with the category itself doing much of the coordinating work. Yet, an examination of Brazil, South Africa and Indonesia shows that the upstream framing is flawed. Enduring cooperation rests not on a shared identity but on convergence around specific issues that persist across changes of government and shifting alignments.

It is worth being precise about what convergence means, since the term can describe almost any kind of cooperation. It has four markers: overlapping interests that do not depend on ideological alignment; persistence across changes of government; issue-specific rather than identity-based groupings; and survival even when the broader relationship cools. It collapses when the shared issue is overtaken by direct competition; when domestic politics lowers the priority attached to it; or when audiences previously kept apart begin to interact. IBSA is the instructive failure here. Built around a shared Global South identity rather than durable issues, it has not held a leaders' summit since 2011.

The takeaway is that middle powers operate before multiple, partially overlapping audiences whose expectations do not always align

The takeaway is that middle powers operate before multiple, partially overlapping audiences whose expectations do not always align. This audience plurality, the different publics before whom these states act and from whom they seek recognition, is a defining feature of the category; what differs is how those audience configurations are structured.

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<sup>20</sup> Carney, "Special Address".

Audiences matter because middle-power influence operates through recognition rather than coercion. When the audience is structurally divergent, taking in domestic stakeholders, regional peers, Global South constituencies and Western capitals at once, recognition in one arena can complicate recognition in another. The discursive and moral agency Carney invokes encompasses multiple audience configurations, which must be managed individually rather than reconciled into a single whole.

Northern middle powers tend to perform in arenas that broadly reinforce one another. Canada, Australia and the UK answer to alliance partners, G7 counterparts and domestic publics that are generally supportive of the alliance system. The recognition they seek – as reliable partners and credible multilateralists – is relatively consistent across these settings. This is why appeals to middle-power solidarity tend to feel intuitive from Ottawa or Canberra: audiences are aligned and coordination costs are low.

Global South middle powers operate in differing and variable fragmented environments. Their audiences have different expectations, and recognition in one arena may come at the expense of recognition in another. Cooperation is possible, but only where this plurality is treated as part of the operating environment. What the literature tends to call ‘ambivalence’ in Southern middle-power behaviour does not capture the underlying necessity of sustaining multiple positions at once.<sup>21</sup> Thus, what appears to be inconsistency is often the management of competing demands. The implication for policy is straightforward: cooperation that depends on aligned expectations is fragile. Successful cooperation is built around points of overlap between otherwise divergent expectations.

Brazil illustrates this through a structural position that has shown different orientations under various governments. Under Jair Bolsonaro (2019–2022), Brazil aligned more closely with the US and Israel, deprioritised South–South platforms and distanced itself from multilateral climate commitments. This strengthened its relations with the Trump administration but weakened its standing in other arenas, including the UN, Mercosur and parts of the Global South. Under Luiz Inácio Lula da Silva (2023–present), Brazil has reactivated its BRICS engagement, hosted a G20 presidency focused on hunger and tax justice and renewed ties with Africa and the Middle East.<sup>22</sup> In this process, relations organised around shared identity claims (alignment with an ideological coalition or membership in a ‘family’ of like-minded states) shifted sharply with changes in government. Engagement organised around overlapping issues, such as agricultural trade, remained in place. The durability of cooperation thus depends on the basis on which it was built, not only on the orientation of the government in power.

South Africa shows a different but related configuration. It operates across multiple audiences that do not automatically reinforce each other. Among its continental peers, it competes for influence with states such as Nigeria, Kenya, Egypt and Ethiopia. In Global

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21 Efstathopoulos, “Global IR and the Middle Power”.

22 On the Bolsonaro–Lula foreign policy divergence, see G. Casarões and D. Flemes, “Brazil First, Climate Last: Bolsonaro’s Foreign Policy” (GIGA Focus Latin America, 5, German Institute of Global and Area Studies, 2019).

South and Non-Aligned constituencies, it is often expected to act as a norm entrepreneur. For its domestic constituency, economic outcomes are the immediate concern. These expectations do not necessarily overlap. South Africa's 2024 case against Israel at the International Court of Justice illustrates how alignment on one front can strengthen recognition in some arenas while producing weaker or uneven responses in others. As one analyst noted, the case 'opened up the space' for South Africa's role as a defender of international legal norms.<sup>23</sup> However, the continental response was muted; as a senior diplomat put it, beyond Ghana, there was little coordinated African backing.<sup>24</sup> At the domestic level, foreign policy is shaped by what one interviewee described as 'a strategic balancing act ... being very aware that back home we've got substantial and tangible needs that are met by things like trade'.<sup>25</sup> This shows that South Africa's engagement is most effective where these expectations converge: in international law, inequality, climate finance and critical minerals governance. Assumptions of automatic continental alignment overstate the continental role and underplay the others.

In Indonesia, this convergence-based engagement is visible in practice. Association of Southeast Asian Nations (ASEAN) centrality, the principle that ASEAN should remain the central driving force in the region's diplomatic architecture, has long anchored Indonesia's foreign policy. Still, in recent years, it has expanded its engagement into more politically diverse arenas: accession to BRICS, a critical minerals agreement with the US and sustained engagement with China.<sup>26</sup> Each of these moves triggers different expectations. ASEAN partners are wary of China, Washington views the BRICS accession with suspicion and Jakarta's own resource-sovereignty narrative is strained by the nickel concessions in the US deal. Its position remains largely unaffected because it does not have to reconcile these engagements into a single identity; managing them in parallel across different issue areas is enough. The risk is that they increasingly interact, narrowing the room for manoeuvre.

Cooperation among middle powers does not emerge from like-mindedness. Rather, it is the product of overlapping interests within otherwise divergent environments

In all three cases, the pattern is consistent. Cooperation among middle powers does not emerge from like-mindedness. Rather, it is the product of overlapping interests within otherwise divergent environments. South–South cooperation is no more automatic than

23 Foreign policy scholar, interview by author, Johannesburg, 2025.

24 Foreign policy scholar, interview by author, Johannesburg, 2025.

25 Risk analyst, interview by author, Johannesburg, 2025.

26 A. Wardhana and R. Dharmaputra, "What BRICS Membership Means for Indonesia's Foreign Policy", *The Diplomat*, January 24, 2025.

South–North alignment. As one South African official put it, ‘[I]n the South, we like to form groupings ... but at the end of the day, what matters is the economy, and there we are all competing.’<sup>27</sup> The implication is that a category-based partnership often misreads the conditions under which cooperation occurs.

## Conclusion

Carney’s Davos address advances three propositions: that the rules-based order has fractured beyond repair; that material capability is not the only currency of international agency; and that middle powers can build variable-geometry coalitions in place of fixed alliances. Each rests on an assumption the speech does not examine: that the states being addressed are like-minded, and that this similarity is what makes their cooperation stable.

This policy insight argues that the category is too narrow and that Carney’s propositions hold only if it is broadened

This policy insights argues that the category is too narrow and that Carney’s propositions hold only if it is broadened. Brazil, South Africa and Indonesia occupy positions that do not fit comfortably within the conventional middle-power category. They exercise influence in ways it was not built to register: control over strategic resources in producer positions, sustained agenda-setting from outside the G7 and norm entrepreneurship from beyond alliance frameworks. Where cooperation among them holds, it is driven by issue convergence rather than a shared identity. This pattern persists through changes in government, shifting regional contexts and uneven stakeholder pressures. None of this contradicts the idea of variable-geometry coalitions. What it does challenge is the assumption that participants operate from a common template.

This has implications for both Northern and Southern policymakers.

For Northern middle powers, the first step is to recognise that the category they have historically occupied is not its fullest expression. Engagement with Brazil, South Africa and Indonesia does not mirror engagement among Australia, Canada or the UK. Concepts now circulating from Ottawa, Canberra or Davos, including strategic autonomy and variable geometry, have long histories in the autonomy, Bandung and Non-Aligned traditions. The second step is to design cooperation around convergence on specific

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<sup>27</sup> Think tank researcher, interview by author, Johannesburg, 2025.

issues rather than category membership. Coordination on critical minerals, for instance, can take the form of G7-centred buyers' arrangements and producer–consumer coalitions that balance developmental and security concerns. South Africa's engagement with European partners during the 2025 G20, in which it did not abandon its producer-state framing, shows that the two logics can coexist. The third step is to accept audience plurality, treating the multiple and sometimes irreconcilable audiences these states answer to as a structural condition rather than a sign of inconsistency.

**For Northern middle powers, the first step is to recognise that the category they have historically occupied is not its fullest expression**

For Global South middle powers, priorities differ. First, they should resist externally imposed labels as a basis for organising cooperation when these do not reflect current practice. In addition, they should describe their diplomatic engagement in terms that reflect the roles these states actually perform. South Africa's Department of International Relations and Cooperation, Brazil's Itamaraty and Indonesia's Kemlu are not a coordinated bloc and should not be treated as such. Coalition proposals from Ottawa or Brussels need to be assessed against actual constraints and priorities, not against a generic invitation to a 'middle-power moment'. The debate within South African policy circles over critical minerals reflects this: it is not a terminological issue, but a question of who sets the terms of cooperation. The underlying practices long predate the current vocabulary: diversifying dependencies, building issue-specific coalitions and extracting leverage from producer positions.

**Global South middle powers should resist externally imposed labels as a basis for organising cooperation when these do not reflect current practice**

The second step is to design cooperation around areas of convergence, recognising what each party brings and is seeking. Climate finance, Bretton Woods reform, critical minerals beneficiation and digital public infrastructure are areas where these alignments are already visible. The persistence of agricultural-trade coordination among these states despite changes in government shows how issue-based cooperation can endure where identity-based alignment does not. The third step is sustained coordination among Global South G20 presidencies, with structured engagement across successive chairs and with institutions such as the AU Commission, the Economic Commission for Latin America

and the Caribbean and the ASEAN Secretariat. The succession from Bali to Johannesburg shows that rotating institutional leadership can accumulate influence over time; the question is whether that accumulation can be converted into durable institutional change.

The diagnosis of rupture holds once it is acknowledged that the fracture looks different from outside the alliance system, and that this reading long predates the current moment

Read this way, Carney's three propositions become sharper. The diagnosis of rupture holds once it is acknowledged that the fracture looks different from outside the alliance system, and that this reading long predates the current moment. The agency claim holds once the relevant constituency is understood to extend beyond the Western core. Variable geometry becomes practicable once it rests on convergence around specific issues rather than assumed similarity. Whether the category is opened in this way depends on policymakers, but not symmetrically. For Northern middle powers, it means adjusting an inherited framework; for those in the Global South, it is the precondition for engagement on terms that reflect their diplomatic practices.

# Authors

## Thaís Dória

is a final-year PhD candidate at the University of Warwick. Her doctoral thesis, “The Theory of Discursive Agency: Middle-Tier States, Hierarchy, and the Politics of Self-Positioning”, examines how middle-tier states in the Global South (Indonesia, Brazil, South Africa) narrate their positions within international hierarchies. LinkedIn: <https://linkedin.com/in/thais-doria> | Personal website: <https://thaisdoria.com/>

## Gustavo de Carvalho

is Acting Programme Head: African Governance and Diplomacy at the South African Institute of International Affairs (SAIIA). His research focuses on South African and Global South foreign policy, BRICS diplomacy, peace operations, and the politics of multilateralism. He is a PhD candidate at the University of the Witwatersrand. He has published widely on African contributions to global governance, South–South cooperation, and the comparative diplomatic strategies of Global South middle powers. LinkedIn: <https://linkedin.com/in/gustavo-de-carvalho-6a6092a>

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## Cover image

Davos, Switzerland – January 20: Canadian Prime Minister Mark Carney delivering the speech at WEF (Harun Ozalp/Anadolu via Getty Images)

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Jan Smuts House, East Campus, University of the Witwatersrand  
PO Box 31596, Braamfontein 2017, Johannesburg, South Africa  
Tel +27 (0)11 339-2021 · Fax +27 (0)11 339-2154  
[www.saiia.org.za](http://www.saiia.org.za) · [info@saiia.org.za](mailto:info@saiia.org.za)