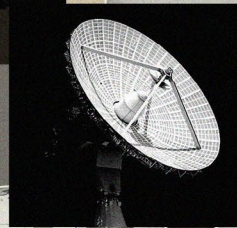
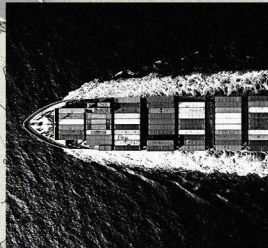
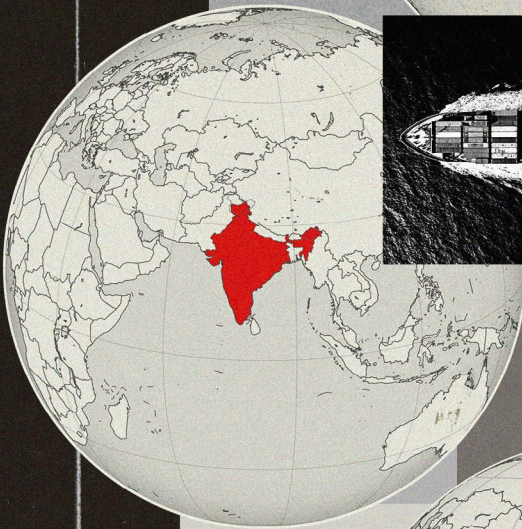
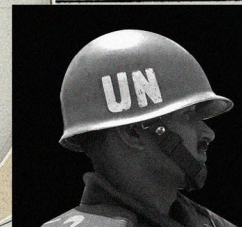


GLOBAL SWING STATES AND THE NEW GREAT POWER COMPETITION

Richard Fontaine and Gibbs McKinley



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EXECUTIVE SUMMARY

INTERNATIONAL POLITICS is undergoing a period of rapid, significant change. China and Russia are working together more closely and alongside Iran and North Korea in opposition to what they view as a U.S.-dominated international order.¹ The current U.S. administration has in its early days pursued a form of upheaval, altering key policies, relationships, and arrangements. Policymakers in Washington represent a mix: Some see the rules-based international order as key to U.S. security, prosperity, and liberty, while others argue that any such order exists only to enrich other countries at America's expense.

In contrast to broad, vague notions of what constitutes international order, five concrete pillars have benefited the United States over recent decades. The *territorial order* aims to protect national sovereignty and discourage wars of conquest; the *global trade order* aims to regularize an open international trading system in which prosperity can increase; the *financial order* aims to facilitate international trade and investment, promote monetary stability, and avoid crises; the *nonproliferation order* attempts to limit the spread of nuclear weapons; and the *human rights order* seeks to preserve the basic rights and liberties of individuals everywhere.

Despite the many doubts about them, these core pillars of the international order enhance the security, prosperity, and freedom of Americans. As a result, the overarching goal of U.S. policy should be to preserve them, even as specific rules and institutions change and adapt. Policymakers should work with allies and against adversaries in this attempt, focusing on six “global swing states”—Brazil, India, Indonesia, Saudi Arabia, South Africa, and Türkiye—that together will exert disproportionate influence over the future of the international order. Each of these countries is multi-aligned and determined to maintain ties with the United States, Russia, and China. They all seek to reform existing rules and institutions. Together, they possess the geopolitical weight to sway the future of global order.

This report offers a multifaceted path for engaging with global swing states, aiming U.S. policy at a vision of world order favorable to American interests and values. Informed by more than a year of research and consultations, it offers a set of cross-cutting and country-specific policy recommendations. The broad recommendations include:

Establish minilateral groupings that include the global swing states.

With multilateral bodies largely paralyzed by differences among the veto-wielding powers, minilateral groups—especially those focused on a specific set of issues—offer innovative ways of harmonizing approaches and multiplying efforts among would-be partners. Washington should explore areas in which minilateral groupings could be useful, including technology, critical minerals, defense industrial base cooperation, infrastructure, and maritime domain awareness, and should look to include global swing states.

Define and address unfair commercial practices by state-owned enterprises.

Beijing's state-owned enterprises' (SOEs) market distortions stifle efforts by the United States and several swing states to build or revitalize their manufacturing and industrial sectors. Washington should explore rules that would govern SOE behavior and should work with key swing states to address Chinese overcapacity.

Develop critical minerals partnerships.

The swing states have expressed interest in capitalizing on their natural resources by working with the United States to process and market their minerals.² Washington should prioritize sectoral trade deals in critical minerals with the swing states, and encourage Brazil, Indonesia, and South Africa to join the Minerals Security Partnership (India and Türkiye are already members).

Empower the U.S. Congress.

Washington should work to link parliamentarians, encourage congressional delegations (CODELs) to the six swing states, support fellowships that embed professionals from each of them in U.S. congressional offices, and encourage other visits and exchanges. Subnational contact would also be useful, including visits and exchanges with governors and mayors of key cities.

Launch a program to immerse American officials in the politics and economics of each global swing state.³

U.S. government expertise on the six swing states remains limited, an omission that will make working closely with them challenging. Although some of the six—and the United States itself—may not be receptive to such a program today, the initiative should remain a long-term objective.

Catalyze academic partnerships.

Encourage top-tier U.S. research universities to establish partnerships with leading academic institutions in global swing states.

More important than any particular policy approach is an appreciation for the concrete benefits that key pillars of international order generate for the United States. None is self-reinforcing, and all are under threat. As a result, Washington must be active in the effort to bolster them, despite current doubts about their benefits. That effort requires prioritization, and a focus on the six global swing states points the way.

INTRODUCTION

GLOBAL POLITICS TODAY is more contested, confrontational, and uncertain than at any time since the end of the Cold War. China seeks domination in Asia and beyond, while Russia remains aggressively revisionist in Europe. Both are working with Iran and North Korea in an “axis of upheaval” to resist a Western-dominated world.⁴ Key U.S. allies in Europe and the Indo-Pacific are growing stronger and more unified, but each has doubts about the future—and about America’s own trajectory. Policymakers in Washington today represent a mix of those who see the rules-based international order as key to U.S. security, prosperity, and liberty, and others who argue that any such order exists only to enrich other countries at America’s expense.

Washington itself is pursuing a form of upheaval. In its first 100 days, the current administration threatened to seize foreign territory, imposed trade barriers on the entire world simultaneously, downplayed the role of democracy and human rights, and hinted at accepting spheres of influence in Eurasia. Whether this pattern will endure remains uncertain. Yet U.S. overtures—to reset relations with Russia, for instance, or perhaps to reach a grand bargain with China—are exceedingly unlikely to succeed in forging a new relationship with either country. Nor will radical revisions to the international order serve American interests better than the existing system, which largely reflects U.S. preferences.

While President Donald Trump’s administration is skeptical about the existing order, the axis countries are outright opposed to it. China, Russia, Iran, and North Korea share the goal of overturning the principles, rules, and institutions that underlie the prevailing international system.⁵ These countries chafe at a world that they believe does not recognize

their natural spheres of influence, the legitimacy of their autocratic systems, or their status and power. They are determined to create an alternative to an international order they consider to be dominated by the United States.⁶ As a result, the long-run competition between the United States and its allies on the one hand, and a revisionist axis of upheaval on the other, will largely represent a contest over the shape of international order.

While conceptions of international order are often broad and even vague, five key pillars are specific and concrete. The *territorial order* aims to protect national sovereignty and discourage wars of conquest. The global *trade order* aims to regularize an open international trading system in which prosperity can increase. The *financial order* aims to facilitate international trade and investment, promote monetary stability, and avoid crises. The *nonproliferation order* attempts to limit the spread of nuclear weapons. The *human rights order* seeks to preserve the basic rights and liberties of individuals everywhere.

Despite the many doubts, including in the current U.S. administration, the United States benefits from, and has a vital interest in maintaining, a global order governed by rules rather than brute power, one in which countries enjoy sovereignty, disputes are resolved peacefully, markets are open to trade, human rights are considered universal, and democracy can flourish. Since the 1940s, Washington has opposed hostile spheres of influence, especially in Eurasia, precisely because they threaten the United States’ desired rules-based order.⁷ The current order has downsides, to be sure, and it has produced discontent among populations and policymakers. Yet the rules-based international order is also a bit like democracy: the worst system except for all the others.

Because the core pillars of the international order enhance the security, prosperity, and freedom of Americans, the overarching goal of U.S. policy should be to preserve them even as specific rules and institutions change and adapt. This objective yields two tasks: first, to reform the pillars—their rules and institutions—to advance U.S. interests and values; second, to create incentives for pivotal countries to embrace the pillars. This report is focused largely on the latter, while recognizing the interplay between the two.

Policymakers should focus on six global swing states—Brazil, India, Indonesia, Saudi Arabia, South Africa, and Türkiye—that together will exert disproportionate influence over the future of international order. Each of the six is multi-aligned, maintaining simultaneous ties with the United States, Russia, and China. None wishes to be forced into a strategic alignment with one great power alone, and all seek meaningful changes in international rules and institutions. Each of the global swing states plays a dominant role in its region and takes actions with worldwide repercussions. They possess sufficient collective geopolitical weight for their policy preferences to sway the future direction of the international order.

The United States should prioritize these countries in its foreign policy. It should encourage swing state

governments to choose policies that reflect the core principles of international order, and it should work to deny advantages to the axis states. That, in turn, requires dealing with each not simply as a pawn in great power competition but as an important country in its own right, with interests and activities that may differ from, but that can ultimately align with, those of the United States. Washington should work with all six on issues such as military basing, digital infrastructure, trade arrangements, global norms, and the future of international institutions.

This report offers a path for engaging with global swing states toward a vision of world order favorable to U.S. interests. It builds on the original 2012 Center for a New American Security (CNAS) report that highlighted four of the current six countries, arguing that a U.S. focus on Brazil, India, Indonesia, and Türkiye could deliver a large geopolitical payoff.⁸ The list now has expanded to include Saudi Arabia and South Africa, given their increased economic and diplomatic heft. International competition today is far more acute than 13 years ago, the shape of international order much more contested, the U.S. role more uncertain, the stakes even higher, and, as a result, the potential role of global swing states in the outcome even greater.

THE CONCRETE PILLARS OF GLOBAL ORDER

IT WAS ONCE AXIOMATIC among Washington policymakers that an international order exists, that it serves American interests, and that the order is worth defending and preserving. No longer. In recent years, some analysts have argued that the liberal international order is a myth, and that there exists nothing to defend or preserve.⁹ Others, including some Trump administration officials, hold that the global order exists but has harmed, not helped, Americans by encouraging U.S. overextension and endless wars, driving mass migration, offshoring manufacturing jobs, and diluting the unifying bond of nationalism.¹⁰ At the same time, revisionist countries such as Russia and China bristle at what they see as an unfairly U.S.-dominated international order that does not accord them the weight, status, freedom of action, and spheres of influence that their power and civilization demand. And still others, including the global swing states, lament the underrepresentation of middle power countries in key international institutions and resent what some see as little more than a mask for Western domination.

Some of the debate is definitional. Policymakers imply a wide range of concepts by invoking “international order,” the “liberal international order,” the “rules-based international order,” or some other variant. Yet its importance goes far beyond the rhetorical. There exists an identifiable international order today based on principles in multiple domains that are instantiated in rules and rooted in institutions that seek to apply them. Some pillars of this order

are under greater pressure than others, but together they have served U.S. interests well across multiple decades.

Much of the glue that binds the United States and its allies is a common appreciation of global order and a determination to see it endure. Russia, China, Iran, and North Korea are vastly different countries that have nevertheless united in their desire to revise the existing order. And the global swing states all seek specific changes to key elements of it. In many ways, today’s geopolitical era—with its great power competition, alliances and axis, middle powers, competition and cooperation—is a struggle over the shape of tomorrow’s world. That is, it is a contest for global order.

The international order comprises numerous elements, but five pillars today are key:

- 1. The territorial order aims to protect national sovereignty and discourage wars of conquest.** It enshrines a prohibition against the forcible change of national borders and holds, as a cardinal principle, that attempts to seize and annex land by force are prohibited. It also includes rules underpinning a maritime order, many of which have been formalized in the UN Convention on the Law of the Sea (UNCLOS).¹¹ While some countries, including the United States, have not ratified the convention, Washington and most major capitals recognize its key

provisions—rules on the limits of territorial waters, an exclusive economic zone (EEZ), and freedom of navigation on the high seas—as customary international law. Other countries, such as China, have ratified the convention but violate it in practice.

U.S. naval power continues to backstop international law governing the use of the maritime domain, and forcible violations of the territorial order on land—such as Iraq’s 1990 invasion of Kuwait and Russia’s 2022 invasion of Ukraine—have spurred the use of American military power.

It was once axiomatic among Washington policymakers that an international order exists, that it serves American interests, and that the order is worth defending and preserving. No longer.

Recent U.S. pronouncements, for example the desire to seize Greenland and annex Canada—even if not totally serious—chip away at this norm. The territorial order has served U.S. interests by helping to prevent wars of conquest, the two largest of which drew in the United States during the first half of the 20th century.

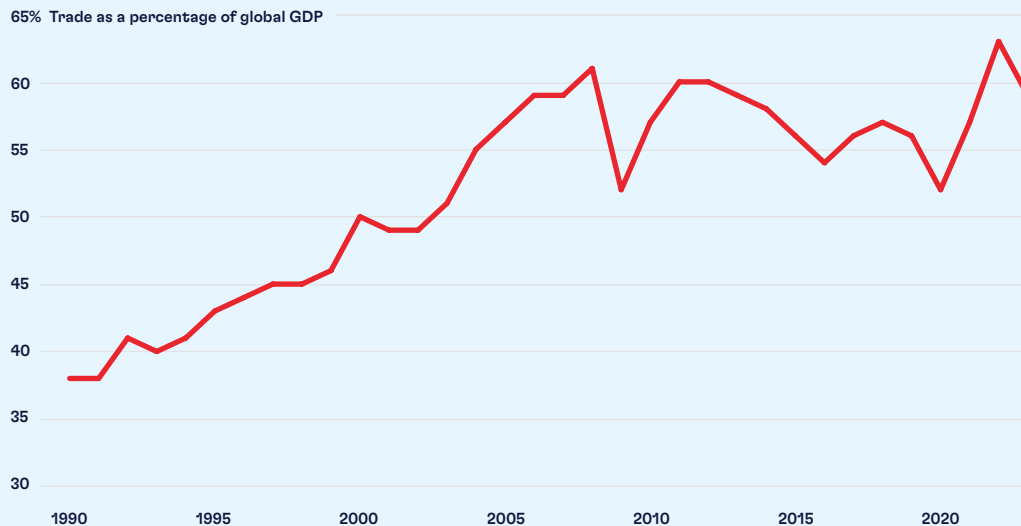
2. **The global trade order aims to regularize an open international trading system in which prosperity can increase.** It is grounded in the General Agreement on Tariffs and Trade (GATT) and embodied in the World Trade Organization (WTO) and its web of rules and dispute resolution mechanisms. Increasingly, legally binding rules established in bilateral and regional trade agreements shape the contours of international trade. Those rules are also increasingly flouted, including by the United States. Nevertheless, the trade system has benefited the United States, by allowing it and other states to acquire resources peacefully and boost prosperity without either conquering territory or enforcing closed economic blocs.

The trade pillar is currently under significant pressure. The Doha Round of global trade talks was

the WTO’s last effort toward international trade liberalization, and those talks were declared dead by members in 2015.¹² In the place of global trade frameworks, regional and bilateral agreements have proliferated, with the United States spurning multilateral trade agreements for more than a decade. Multiple U.S. administrations have moved to weaken the WTO’s dispute resolution mechanisms, and the Trump administration has imposed tariffs on countries even when those tariffs violate WTO rules or commitments made in U.S.-signed agreements. Trump’s April 2025 announcement of high tariffs on most of the world was widely interpreted as an effort to upend the global trading order.

3. **The financial order aims to facilitate international trade and investment, promote monetary stability, and avoid crises.** This pillar is rooted in the U.S. dollar as the predominant international reserve currency, flexible exchange rates, and general currency convertibility. The International Monetary Fund (IMF) fills a role as a lender of last resort. In recent years, China and Russia have promoted alternatives to dollar dominance in both trade transactions and reserve holdings. Countries, including the global swing states, on occasion support such alternatives, given their own susceptibility to unilateral U.S.-imposed financial sanctions. But efforts such as denominating transactions in renminbi (RMB) or creating a currency for the bloc originally comprising Brazil, Russia, India, China, and South Africa (BRICS), and which now also includes Egypt, Ethiopia, Indonesia, Iran, and the United Arab Emirates, have done little to replace dollar centrality.

The Trump administration has defended this pillar of the economic order with vigor, threatening steep tariffs on countries that seek to replace the U.S. dollar.¹⁴ The financial order benefits the United States; the global demand to hold dollars allows the United States to issue debt at a lower cost than would otherwise be the case and to use financial sanctions as a potent tool of foreign policy. Institutions such as the IMF have helped avoid or respond to financial crises, reducing the chances of contagion and spreading the cost of responding to include other wealthy countries.

Figure 1: The Role of Trade in Global Gross Domestic Product (GDP)¹³

The upward trend of trade as a percentage of global GDP has faltered significantly since 2008.

4. **The nonproliferation order attempts to limit the spread of nuclear weapons.** The Treaty on the Non-Proliferation of Nuclear Weapons (NPT) draws a strict distinction between recognized nuclear weapons states and all others. This pillar includes the International Atomic Energy Agency (IAEA) and the four multilateral export control regimes—the Wassenaar Arrangement, the Nuclear Suppliers Group, the Australia Group, and the Missile Technology Control Regime—that attempt to limit the proliferation of particular weapons and delivery systems. Some countries—India, Pakistan, and North Korea, for instance—have acquired nuclear arms outside the NPT framework, and others, such as Iran, threaten to do so in the future.

The United States has played a key role over the years in seeking (not always with success) to prevent non-NPT states, particularly those hostile to Washington, from acquiring nuclear weapons and delivery systems. The Trump administration has, for instance, both negotiated with Tehran and used force after it assessed that diplomatic efforts to end its nuclear program failed.¹⁵ The nonproliferation order benefits the United States

by reducing the number of nuclear-armed hostile countries to fewer than what would likely be the case otherwise, and by enhancing relative U.S. military power.

5. **The human rights order seeks to preserve the basic rights and liberties of individuals everywhere.** These rights are enumerated in documents such as the Universal Declaration on Human Rights and the UN Convention on Civil and Political Rights, along with the constitutions and laws of many democracies. Moscow and Beijing actively reject the existence of universal values, even as their own constitutions nominally guarantee the rights to speech, assembly, political activity, and association.¹⁶ China and Russia are not alone in asserting that criticism of abuses amounts to impermissible interference in their domestic affairs, and both countries have recently claimed that they, too, are democracies—simply of a different sort.

The promotion of human rights has represented an element of U.S. foreign policy since at least the late 1970s, though its application has been inconsistent. Washington has lurched in recent

years, with the spectrum of policy stretching from President Joe Biden's claim that the world's democracies and dictatorships were locked in competition to President Trump's relative indifference to human rights in foreign countries. The expansion of basic rights and liberties has benefited the United States by increasing the number of like-minded democracies, making the preservation of freedom at home easier than would be the case in a world replete with autocratic predators.

In contrast to some abstract notion of an undifferentiated "liberal international order," these pillars generate concrete benefits for the United States and many other countries. By prohibiting territorial aggression, promoting generally free trade, enshrining dollar dominance, restricting the spread of nuclear weapons, and protecting norms of human rights and democracy, the existing international order reflects U.S. interests and preferences. This interlocking web of global rules, institutions, and relationships has fostered peace, prosperity, and freedom for multiple decades. Currently under pressure in virtually every corner of the world,

including in the United States itself, the pillars may well benefit from new and different rules, differently weighted institutions, and more countries involved in their defense. The principles that underlie each, however, should endure. Productive ties to the global swing states, now and over the long run, can assist in that effort.

The United States retains interests in its relations with the six global swing states that lie outside the pillars of international order. For instance, China pursues a global basing strategy that could alter the military balance of power in key regions and constrict U.S. freedom of action. It also funds the establishment of digital infrastructure that empowers Beijing at the expense of Western providers. Russia seeks to displace the United States and Europe in regions of the global south, offering itself as a no-conditions security and economic partner. Both China and Russia foster an anti-Western narrative that seeks solidarity with countries that may feel similarly resentful of U.S. global leadership. These and other issues will remain contested and should represent areas of focus for Washington in its relations with the six global swing states.

What's in a Name? Defining a Global Swing State

The first CNAS report on global swing states defined them with an analogy to domestic U.S. politics. In the American political context, swing states are those whose mixed political orientation gives them a greater impact than their population or economic output might warrant. Such states promise the greatest return on investment for U.S. presidential campaigns deciding where to allocate scarce time and resources. Likewise, in U.S. foreign policy, a focus on Brazil, India, Indonesia, Saudi Arabia, South Africa, and Türkiye can deliver a large geopolitical payoff. These countries boast outsized economic, diplomatic, and geopolitical heft by comparison with other emerging and middle powers. Their multi-aligned relationships with great powers and their differentiated approach to the pillars of global order distinguish them from the Western bloc or the axis of

upheaval. Their choices may, however, decisively influence the trajectory of the current international order.¹⁷ And their varying relationships with Moscow and Beijing are of significant interest to Washington.

Since its inception, multiple analysts have adopted the global swing states concept, adapting it to issues as varied as transatlantic relations and internet governance.¹⁸ Some countries affirm the label—Brazilian policymakers, for instance, have tended to see the term as validating the global role that Brasília seeks to play. Others have not—Turkish policymakers and analysts express concern that the term "swing state" suggests that Ankara is uncertain or indecisive about its interests, and they insist that Türkiye does not "swing" between paths.¹⁹ Still others come down elsewhere. A prominent Indian analyst, for example, maintains that

India was a global swing state a decade or so ago but is not one today.²⁰

The framework of a global swing states concept intends neither to connote irresolution nor to demarcate some new international grouping like the Group of 7 (G7) or BRICS. Instead, it aims to clarify Washington's foreign policy priorities. Outside key U.S. allies and adversaries, these are the countries that will matter most in fashioning the world to come. They deserve disproportionate time, attention, and potentially resources from the United States. In a world riven by multiple, simultaneous competitions with major powers, Washington cannot treat every country alike in its foreign policy. Outside allies, on the one hand, and adversaries, on the other, the six global swing states are countries on which the United States should focus most.

Figure 2: Percentage of Global Gross Domestic Product Based on Purchasing Power Parity²¹

The combined heft of the global swing states' economic output is significant, giving the countries collective influence over the trajectory of the current international order.

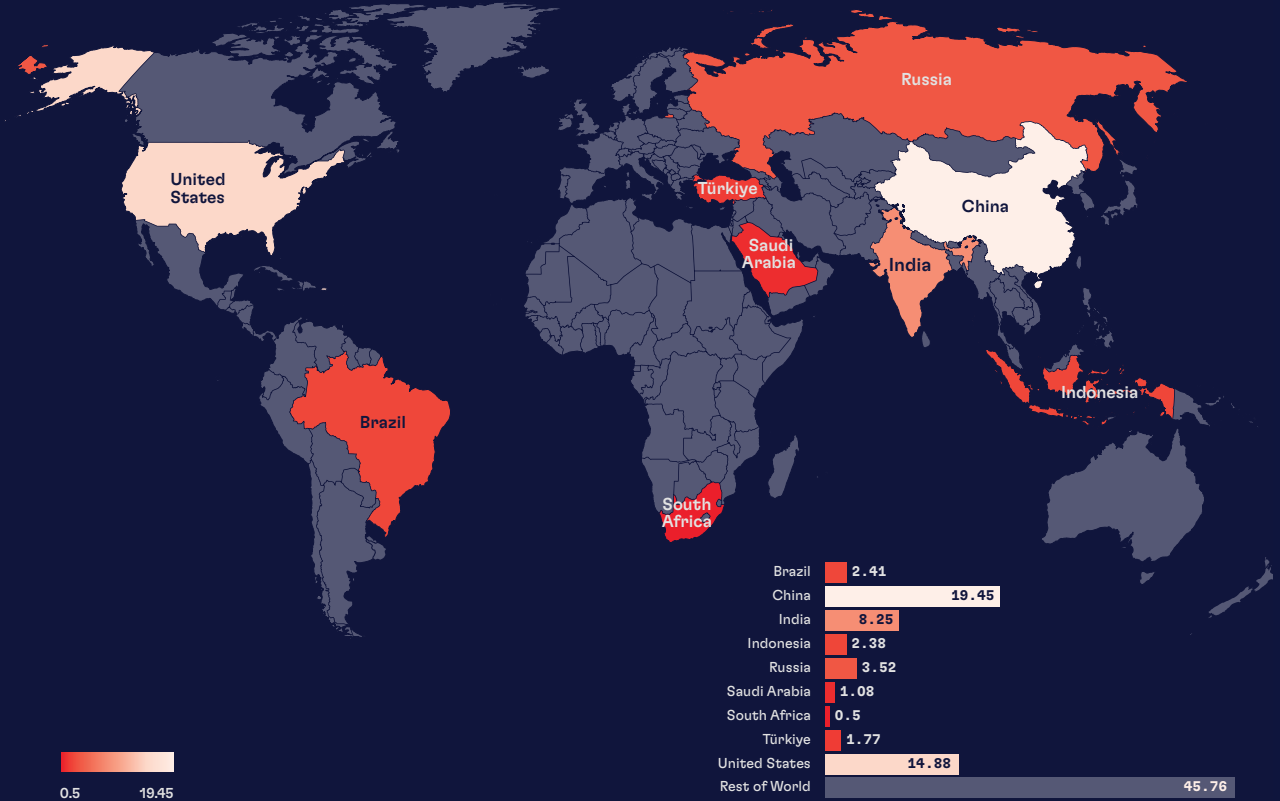
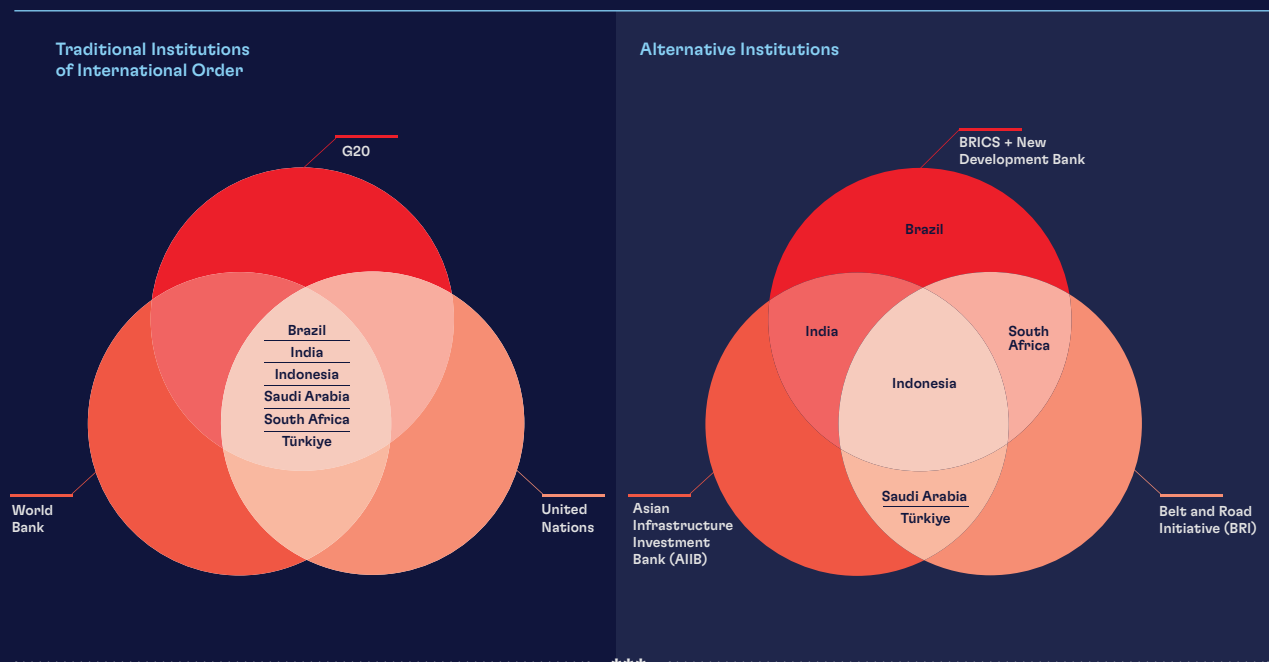


Figure 3: An Alternative World Order?²²

The swing states participate in both traditional international institutions and newer ones that seek to provide alternatives.



THE BACKDROP OF INTENSIFIED COMPETITION

AFTER INVADING UKRAINE in 2022, Russian President Vladimir Putin stated that, “The Ukraine crisis is not a territorial conflict. . . . It is about the principles on which the new international order will be based.”²³ The next year, standing alongside Putin, Chinese Communist Party General Secretary Xi Jinping added, “Right now there are changes—the likes of which we haven’t seen for 100 years—and we are the ones driving those changes together.”²⁴ In a lengthy May 2024 joint statement, Xi and Putin made their long-term goals clear. “Russian-Chinese relations,” they wrote, “stand the test of rapid changes in the world, demonstrating strength and stability, and are experiencing the best period in their history. . . . [We] intend to increase interaction and tighten coordination in order to counter Washington’s destructive and hostile course towards the so-called ‘dual containment’ of our countries.”²⁵ Such remarks illustrate the increasingly competitive backdrop against which U.S. foreign policy plays out.

China and Russia have steadily deepened their relationship since the conclusion of the Cold War, a process that sharply accelerated after Russia annexed Crimea in 2014. Between 2013 and 2021, China’s share of Russian external trade doubled from 10 to 20 percent. At the same time, Russia’s arms exports to China were substantial—from 2018 to 2011, Russia supplied a combined total of 83 percent of China’s imported weaponry. Russian military technology has played a critical role in boosting China’s air defense, antiship, and submarine capabilities, strengthening China’s position in any potential naval confrontation. Increasingly, Beijing and Moscow also articulate a

common strategic vision. In early 2022, Putin and Xi declared a “no limits” partnership, promoting an “international relations of a new type”—essentially advocating for a multipolar world no longer dominated by the United States.²⁶

Compounding the challenge, China and Russia are joined by Iran and North Korea in efforts to create alternatives to the prevailing order. As then-Secretary of State Antony Blinken argued in 2024, the revisionist powers “are determined to alter the foundational principles of the international system” and share a goal of “diminishing U.S. influence . . . and rolling back liberal democracy.”²⁷ In March 2025, the director of national intelligence’s annual threat assessment stated: “Russia, China, Iran and North Korea—individually and collectively—are challenging U.S. interests in the world by attacking or threatening others in their regions, with both asymmetric and conventional hard power tactics, and promoting alternative systems to compete with the United States, primarily in trade, finance, and security.”²⁸

Each of these four nations asserts a sphere of influence: China includes Taiwan and the South China Sea in its “core interests”; Iran views its proxies in Iraq, Lebanon, Syria, Yemen, and elsewhere as an “axis of resistance”; North Korea claims the entire Korean Peninsula; and Russia includes, at a minimum, the countries that constituted its historic empire in a “near abroad.” The United States is perceived by all four countries as the primary obstacle to establishing these spheres of influence, and they all seek a reduction in Washington’s presence in their respective regions.

All reject the principle of universal values and interpret Western democracy promotion as an effort to erode their legitimacy and destabilize their domestic politics. Each maintains that sovereign nations should have the authority to define democracy for themselves as opposed to a common standard. They resist the expansion of U.S. alliances, reject American nuclear weapons being stationed abroad, and denounce the use of sanctions. Working together, the four enhance their military capabilities; weaken the impact of U.S. foreign policy tools, such as sanctions and export controls; and obstruct Washington and its allies from upholding international norms. Even if they temporarily cooperate with the United States, they remain convinced that the West will never truly accept their rise—or return—to power on the world stage.

This axis of upheaval is emerging as a new pole of global power that appeals to nations discontented with the present system. They are together shaping a world increasingly defined by two distinct and competing orders.²⁹ They also seek partners, and while the global swing states will not make an overarching strategic choice to join the axis or the West, their loyalties and policy preferences will constitute a commons for rivalry. As the 2025 director of national intelligence report put it, there is “pressure on other global actors to choose sides.”³⁰

Just as the United States, China, and Russia compete for influence in the global swing states, the six countries themselves will act nimbly to maximize their freedom of action amid the great powers. They can be expected to pursue economic, diplomatic, military, and technological ties with members of both groups. U.S. policymakers should make it a priority to deny advantages to the axis in these countries, encouraging swing state governments to choose policies that favor the prevailing order. In practice, that means using trade incentives, military engagement, foreign aid, and diplomacy to prevent swing states from hosting axis members’ military bases, giving axis members access to their technology infrastructure or military equipment, or helping them circumvent Western sanctions.³¹

The emergence of alternative institutions is compounding the degree of contestation over the shape of the international order. The BRICS, for example, which was established in 2009 and brought together Brazil, Russia, China, India, and eventually South Africa—was for years disregarded as too diverse and ideologically incoherent to offer a real alternative to existing institutions.³² It still struggles, at times, to define clear goals, and its members have competing interests—especially on security and trade policy.³³ Yet the BRICS has recently expanded significantly



Pictured from left: Brazilian President Luiz Inácio Lula da Silva, Chinese Communist Party General Secretary Xi Jinping, South African President Cyril Ramaphosa, Indian Prime Minister Narendra Modi, and Russian Foreign Minister Sergei Lavrov at the 15th BRICS summit, held in Johannesburg, South Africa, in 2023. The summit saw agreement to admit six new member countries: Argentina (which later declined), Egypt, Ethiopia, Iran, Saudi Arabia (which has so far delayed officially joining), and the United Arab Emirates. The group's expansion is a challenge to the existing world order. (Gianluigi Guercia/Pool/AFP via Getty Images)

and is attempting to establish itself as a forum to coordinate new economic and diplomatic projects.

In 2014, the group announced the New Development Bank to complement existing international institutions and provide a financial safety net for its members.³⁴ The bank aims to make the global financial architecture more favorable for emerging economies, including by expanding projects financed in local currencies—which it has done with limited success.³⁵ Russia saw a greater diplomatic purpose in the grouping after it annexed Crimea that same year. Putin has twice hosted BRICS summits—in 2015 and again in 2024, following Russia’s invasion of Ukraine—to demonstrate that the Kremlin is not politically isolated, despite the West’s best efforts.³⁶ In July 2024, during Russia’s BRICS presidency, Putin described his aim as being to overthrow the “classic colonialism” of the U.S.-led order.³⁷

The emergence of alternative institutions is compounding the degree of contestation over the shape of the international order.

The BRICS expansion in 2024 to include Egypt, Ethiopia, Iran, and the United Arab Emirates, as well as Indonesia in 2025, has only increased the group’s economic power and influence. The 10 member countries represent roughly 35 percent of global gross domestic product (GDP) in purchasing power parity terms, outpacing the G7’s 30.3 percent, and 45 percent of the world’s population resides in BRICS countries—in contrast to less than 10 percent in the G7 countries.³⁸ The group’s reach and coherence remains limited. But with the likely addition of Saudi Arabia, the BRICS will take one more step in its attempt to become a viable counterweight to existing multilateral institutions.

The Belt and Road Initiative (BRI), announced by China in 2013, represents another effort at generating alternatives. The BRI aims to strengthen China’s global connectivity through infrastructure investments, expand Chinese influence in key countries, and counter that of the United States.³⁹ China has since invested billions of dollars in infrastructure through the initiative—quickly surpassing U.S. efforts.⁴⁰ Four

of the six countries identified in this study, excluding Brazil and India, participate in the initiative and have accepted varying levels of funding through it from China. As part of the BRI, China also established the Asian Infrastructure Investment Bank (AIIB), whose membership has expanded to include countries that do not participate in the Belt and Road. Like the BRICS and the BRI, the AIIB provides alternatives to lending institutions such as the World Bank.

China successfully shaped a “mega-regional” trade deal, the Regional Comprehensive Economic Partnership (RCEP), signed in late 2020 after eight years of talks. The agreement represents the world’s largest regional trade agreement, as measured by its share of global trade, GDP, and population—and stands in contrast to the United States’ withdrawal from the Trans-Pacific Partnership (TPP).⁴¹ Though the RCEP represents a low-standards deal in contrast to high-quality agreements such as the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), it nevertheless allows China to shape trade rules in the region. Instead of forging its own high-quality pacts, the United States in recent years has instead focused on tariffs, export controls, and other defensive economic measures.

Since its inception in 2001, the Shanghai Cooperation Organization (SCO)—which the U.S.-China Economic and Security Review Commission identifies as “a test bed for Chinese power projection”—has expanded to nine full members, including India in 2017.⁴² Türkiye, unique among NATO nations, has expressed interest in joining the SCO.⁴³ If it did so, a U.S. military ally would be joining an organization that in 2023 admitted Iran as a full member. While one should not overestimate the SCO’s geopolitical importance, it nevertheless illustrates one more alternative to existing international frameworks.

None of these initiatives on their own offer a viable alternative to the existing global system—even together, they remain a far cry from the system of multilateral institutions that form the backbone of the current rules-based world order. It is, however, increasingly likely that smaller states will seek opportunities outside of existing institutions if these fail to offer emerging and middle powers the representation and economic access they crave. This, in turn, will put additional pressure on the key pillars of international order.

The current wild card in this changing geopolitical game is the United States itself. The United States created and has invested in the international order because it reflects American preferences and extends U.S. influence. Washington has long defended the pillars of international order because they serve its interests and accord with its values. This approach can no longer be assumed.

Since taking office for the second time in January 2025, President Trump has nodded toward a spheres-of-influence world rather than a strict territorial order. While noting that Russia's invasion of Ukraine took place across the ocean—a long way away from the homeland—he has repeatedly suggested that the United States should acquire Greenland, Canada, and the Panama Canal, with or without the consent of their people.⁴⁴ At the same time, the Trump administration has imposed tariffs on many countries in violation of WTO rules and U.S. trade agreements—even the Trump-negotiated U.S.-Mexico-Canada Agreement.⁴⁵ Trump has downplayed human rights abuses in foreign countries and has taken a more narrowly construed approach to nonproliferation, seeking to prevent hostile powers such as Iran from getting nuclear weapons but expressing far less alarm than his predecessor at the prospect of allies such as South Korea acquiring an arsenal.⁴⁶

What to make of all these moves remains unclear. It seems extraordinarily unlikely that the United States will invade Greenland or annex Canada, actions akin to Putin's violation of the territorial order. Even as the current U.S. administration suggests its own territorial acquisitions, it has maintained the flow of weapons and intelligence (despite a brief interregnum) to Ukraine as it resists Russia. The administration's imposition of tariffs appears infinitely variable and may serve mostly to increase

leverage in forthcoming negotiations. Trump may, as in his first term, speak up about human rights abuses in countries such as Venezuela and China while remaining quieter about transgressions among friends such as Saudi Arabia—and he would not be the first U.S. president to embrace the inconsistency.

In the research for this project, analysts more than once observed, semi-jokingly, that the United States itself may now be the quintessential global swing state. Does Washington wish to preserve world order or upend it? Time will tell whether the Trump administration rejects the traditional rules-based order and embraces some alternative. The likeliest outcome appears to be that no overall strategy and no alternative vision informs the administration's foreign policy views. Instead, U.S. foreign policy currently stems from a combination of perceived immediate security

The current wild card in this changing geopolitical game is the United States itself.

concerns, a cramped reading of trade economics, a penchant for deal-making, the desire for a generally peaceful international environment, and a need to make highly visible announcements that will resonate among the president's supporters. If this reading is correct, the pillars of global order will remain, albeit indifferently supported by the United States, and they will continue to serve American interests. Countries such as Russia and China will continue to resist their application and seek alternatives that serve their autocratic systems and desires for regional dominance. The contest will endure, with the six global swing states continuing to play a disproportionately important role in the outcome.

THE GLOBAL SWING STATES

THE SIX GLOBAL SWING STATES differ in innumerable ways, but they share striking commonalities. Brazil, India, Indonesia, Saudi Arabia, South Africa, and Türkiye are all multi-aligned regional powers that fit neatly and exclusively into neither the Western bloc nor the axis of upheaval. Each is a regional heavy-weight and takes actions with global resonance. All actively pursue institutional reform of global governance, including greater representation for countries like themselves. All are Group of 20 (G20) members, with large populations and sizable economies, and all are members of collective bodies—the BRICS, the Quadrilateral Security Dialogue involving Australia, India, Japan, and the United States (Quad), NATO, the Gulf Cooperation Council, the Association of Southeast Asian Nations (ASEAN), the African Union—where they tend to hold outsized weight. None of the six sanctioned Russia after its invasion of Ukraine, China is a top trade partner of all, and each has long-standing and often complicated relations with the United States.

This section examines the positions of each of the global swing states with respect to the great powers, in key international institutions, and toward the pillars of international order in which they play the most significant roles.

Brazil

Brazil boasts a population of 214 million—roughly one-third of South America’s total—and the largest landmass and GDP on the continent. It claims a significant role in world trade as the leading producer of soybeans, beef, and iron ore.⁴⁷ Brazil has taken on leadership roles in multilateral institutions, including

the presidencies of the G20 and BRICS groups in 2024 and 2025, respectively, and hosting the UN Climate Change Conference (COP30) in late 2025.⁴⁸

Brazil is a longstanding democracy and an active participant in the global order. At the same time, it is a vocal advocate for reforming the current international system to achieve what it perceives as a more just distribution of power.⁴⁹ It has sought to act as a voice for the global south, including the swing states identified in this report. As president of one of the most influential global south countries, Luiz Inácio Lula da Silva’s vocal demands to reform the global financial system and criticisms of the West’s handling of Ukraine and Gaza give voice to broader perspectives.⁵⁰

Nonalignment is a well-established policy in Brazil that permeates the country’s government and shapes key decision-makers’ choices. Officials in Brasilia take a largely pragmatic approach to the great powers, aiming to achieve the most favorable economic and political outcomes for Brazil rather than picking sides. Brazil has sought where possible to act as a bridge among the United States, Russia, and China—including acting as a mediator in the Russia-Ukraine war.

Brazil has recently pursued a relationship with Russia in part to implement its strategy of active nonalignment.⁵¹ The two countries have had a “strategic partnership” since 2002, and Brasilia looks to Moscow as an ally in its efforts to reform the international system. The Russian ambassador to Brazil in July 2024 publicly supported its candidacy for permanent United Nations Security Council (UNSC) membership, and both countries were founding members of the BRICS.⁵² The relationship also stems

from economic necessity; Brazil relies on Russia for a quarter of its fertilizer imports, which are crucial for the country's agribusiness—a backbone of its economy.⁵³ Brazil's dependence on Russian fertilizer appears to have discouraged it from wholly condemning Moscow's invasion of Ukraine.

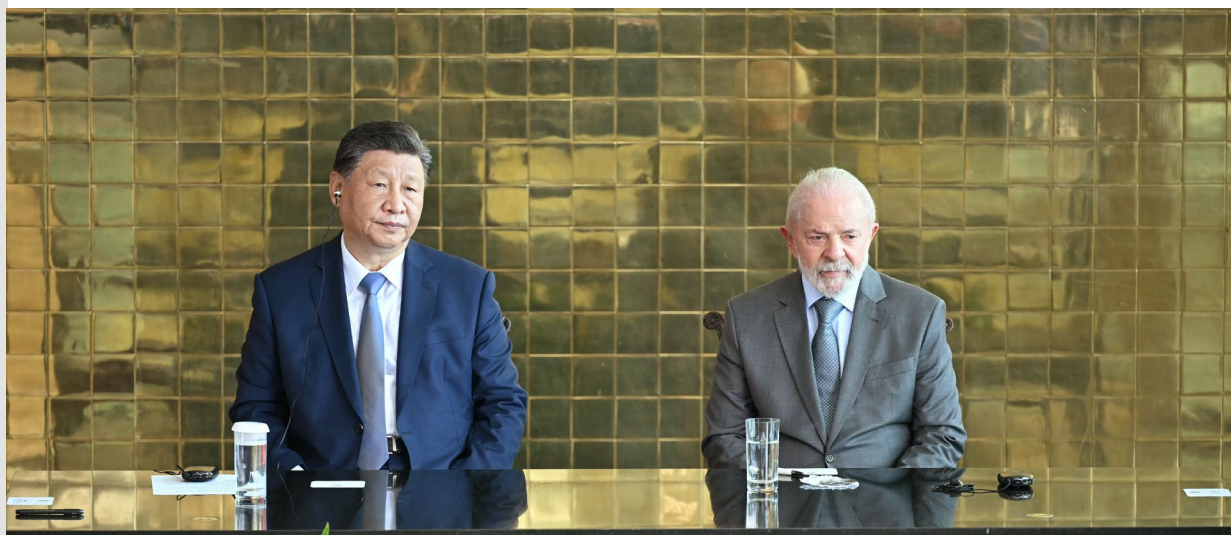
Brazil and China recently celebrated 50 years of diplomatic relations and have enjoyed a "Global Strategic Partnership" since 2012.⁵⁴ Brasília sees a like-minded partner in China when it comes to reforming the rules-based order. It cooperates with Beijing in the BRICS group, supporting China's expansion agenda partially in hopes that Beijing might eventually support its seat on the UNSC.⁵⁵ High-profile engagements abound, with Xi and Lula upgrading the status of diplomatic relations during a state visit to Brasília in November 2024.⁵⁶

Brazil also looks to China for economic opportunity and global political influence. China has been Brazil's number one trade partner since 2009, and total bilateral trade increased 37-fold from 2003 to 2022, reaching \$152.8 billion in 2022.⁵⁷ Against U.S. wishes, Brazil welcomed Huawei's buildup of the domestic 5G network and continues to court Chinese technology investment, including in the semiconductor industry.⁵⁸ Chinese investment in Brazil reached almost \$80 billion between 2003 and 2022, multiples more than any other Latin American

country and two-and-a-half times more than the second-largest regional destination for Chinese investment, Peru.⁵⁹ Much of this investment is in extractives and infrastructure, placing Brazil in the crosshairs of U.S.-China competition and emblematic of Brazil's position as a nonaligned emerging power. Brazil chose not to sign on to China's Belt and Road Initiative in October 2024, instead seeking alternative ways to collaborate with Chinese investors.⁶⁰ Brazil aims to benefit from U.S.-China competition, as when it increased soybean exports to China after the trade war initiated during Trump's first term.⁶¹

As the world's fourth-largest democracy, Brazil shares values with the United States in a way that it does not with either Russia or China. Brasília and Washington have engaged on shared priorities such as democracy, human rights, and climate change.⁶² These issues hinge, however, on the ideological preferences of those in power. They diminished in priority under the administrations of Jair Bolsonaro and Trump, for instance, and can easily fall by the wayside. The two countries retain robust military-to-military ties, dating to World War I, and recent years have seen increased interoperability exercises and defense agreements in science and technology.⁶³

Economic ties have proven durable. The United States is the primary destination for Brazilian exports of manufactured goods and the top source of Brazil's



Chinese Communist Party General Secretary Xi Jinping and Brazil's President Luiz Inácio Lula da Silva prepare to sign bilateral agreements at Alvorada Palace in Brasília on November 20, 2024. Xi's productive state visit to Brazil highlighted Brasília's intent to balance between the great powers. (Evaristo Sa/AFP via Getty Images)

foreign direct investment.⁶⁴ The United States is Brazil's second-largest trade partner after China and should remain an important economic partner well into the future, even with recent tariff increases and national security-focused Section 232 investigations in sectors such as critical minerals and lumber.⁶⁵ In contrast to its trade with China, which relies on low-value exports,

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the majority of Brazilian exports to the United States are job-producing, high value-added manufactured goods.⁶⁶ Bilateral economic ties remain, however, below their potential. "Custo Brazil," or the "Brazil Cost"—referring to the high tax burden and level of difficulty in producing or selling in Brazil—impedes progress in U.S.-Brazil trade and investment.⁶⁷ The Trump administration's protectionist tendencies add another layer of complexity.

TERRITORY. Sovereignty and the fundamental equality of states in the international system are enshrined in Brazil's constitution.⁶⁸ Brazil remains wary of a global order that it sees as privileging the United States and is cautious of using punitive measures such as sanctions to turn an aggressor state into an international pariah.⁶⁹ This view has, at times, brought Brazil into conflict with an order that censures violations of sovereign territory.

In the case of Russia's invasion of Ukraine, for example, Brazil initially refused to condemn Russia's actions and abstained from the 2014 UN resolution on the Russian annexation of Crimea.⁷⁰ It has since taken a stronger stance in the face of Russia's expanded violation of Ukraine's territory in 2022, voting in favor of UN resolutions demanding Russia's unconditional withdrawal from Ukraine. Brazil also voted in favor of the February 2023 UN General Assembly resolution calling on Russia to withdraw to its internationally recognized borders, the only BRICS country to do so.⁷¹ However, it criticized other countries' wholesale use of sanctions and has repeatedly refused to sell weapons to Ukraine, offering only to broker peace with Russia and presenting a joint proposal for negotiations with China.⁷²

In its own region, Brazil recently has taken a stronger stance on territorial aggression. It has supported Guyana's sovereignty over the Essequibo region claimed by Venezuela. After Caracas suggested interest in acquiring its neighbor's territory, Brazil moved military forces to the region bordering Venezuela and Guyana, signaling that it could deploy military force.⁷³

Brazil has also taken steps to support global maritime security, including in the Red Sea where, in command of Combined Task Force 151, it has led anti-piracy missions in the region.⁷⁴ Brazilian forces participate in the biennial U.S. Southern Command-sponsored PANAMAX exercise, which improves the interoperability of forces that would defend the Panama Canal.⁷⁵ Brazil has partnered with the United States to share and exchange maritime tactics, techniques, and procedures and is a signatory to UNCLOS.

TRADE. As a founding member of the WTO and its predecessor GATT, Brazil is a longstanding supporter of the international trade order. Brazilian diplomat Roberto Azevedo led the WTO for seven years and Brazil has often deployed the WTO's dispute resolution system.⁷⁶ Brasilia sought to address U.S. and EU agricultural subsidies to further the interests of its agricultural industry and achieved notable victories in the WTO, including its case against Washington on cotton subsidies.⁷⁷ Consistent with its overarching policy, Brazil has regularly sought greater representation for the global south in institutions such as the WTO, and it advocates for positions broadly supportive of emerging markets.⁷⁸

Despite its participation in multilateral trade institutions, Brazil has long retained a notoriously closed economy. It has leveraged industrial policy and the regional trade bloc Mercado Común del Sur (MERCOSUR, or "Southern Common Market") to protect domestic industries. MERCOSUR features a single external tariff, with peaks on sensitive items, and it facilitates trade within the bloc.⁷⁹ Despite the protectionist trendline globally, there has been guarded optimism that after 25 years of negotiations, a MERCOSUR-European Union trade deal might finally come to fruition, creating a market of 700 million people by dropping tariffs on more than 90 percent of goods.⁸⁰ However, the deal still faces hurdles, including from European agricultural

interests and the Brazilian and Argentine auto industries. Policymakers in Brasilia are adamant that Brazil still believes in trade agreements as a path toward economic development, but the current inflection point in global trade means the country is not likely to pursue other avenues to liberalize its trade practices anytime soon.⁸¹

FINANCE. Brazil plays an active role in the global financial architecture and has invested heavily in the development and maintenance of the World Bank and the IMF. The Inter-American Development Bank is run by former Brazil Central Bank governor Ilan Goldfajn. At the same time, Brasilia is a vocal proponent of reforming the terms of the system to better match today's financial landscape and reflect the emergence of a multipolar system, and Brazil is an outspoken supporter of tax policies to address income inequality globally.

While the BRICS effort in this regard is limited, Brazil has often sought alternatives to the U.S. dollar as the world's reserve currency. It believes that dollar dominance allows the United States to influence fiscal and monetary policy to an unacceptable extent, and a 2024 poll showed that 81 percent of Brazilians disapprove of U.S. dollar dominance.⁸² President Lula called for developing countries to replace the dollar with domestic currencies in cross-border transactions.⁸³ As it looks to reduce its reliance on U.S. dollars in trade and financial relations, the partner Brasilia has turned to most often is China. By the end of 2022, the RMB became Brazil's second-largest reserve currency behind the dollar, though it still amounted to just 5.4 percent of central bank holdings.⁸⁴ In 2023, the two countries announced the creation of a "clearing house" that would facilitate deals and loans without dollar-denominated transactions.⁸⁵

NONPROLIFERATION. Brazil supports the nonproliferation order while seeking changes that reflect the imbalance between states with and without nuclear weapons.

As party to the Treaty of Tlatelolco, Brazil has advocated for the denuclearization of the South Atlantic.⁸⁶ It signed the NPT in 1998 and ratified the Comprehensive Nuclear-Test-Ban Treaty (CTBT).⁸⁷ It was the first country to sign the Treaty on the Prohibition of Nuclear Weapons (TPNW) in 2017.⁸⁸ Though negotiations to ratify the treaty in Brazil are still ongoing, Brazil welcomed the TPNW's entry into

force in 2021 as "a historic achievement" that reflects an international consensus opposed to the use of nuclear weapons.⁸⁹

Beneath Brazil's adherence to nonproliferation principles are frustrations with the nuclear order. Brasilia perceives that, despite its leadership on nonproliferation, it has not reaped sufficient benefits and receives unfair treatment.⁹⁰ Policymakers point, for instance, to the fact that while India has not joined the NPT, the United States and others nevertheless support its bid for a permanent seat on the UNSC.⁹¹ Brazil is an advanced nuclear nation that enriches uranium, has functioning nuclear plants, and has an active nuclear submarine program. It has not signed the IAEA Additional Protocol, but officials remain adamant that Brazil has no nuclear weapons ambitions.⁹²

Brazil would prefer to work with the United States on its nuclear submarine program, but Washington has for decades declined to share nuclear propulsion technology as a matter of policy. When Washington signed the Australia–United Kingdom–United States (AUKUS) agreement and Australia became an exception to that rule, Brazilian policymakers were caught off guard.⁹³ Brasilia is currently working with France to develop its latest submarine and may be tempted to pursue help from Russia or China on this no-fail national project.⁹⁴

HUMAN RIGHTS. Brazil regularly supports human rights in the international arena but generally refrains from what it views as infringements on other nations' sovereignty.⁹⁵ Brazil began holding human rights dialogues in 2015 with the United States to discuss multilateral cooperation and issues of bilateral concern, such as political violence and the protection and promotion of religious freedom.⁹⁶ It has signed multiple inter-American and UN treaties and conventions concerning human rights.⁹⁷ Brazil supported South Africa's controversial move to take Israel to the International Court of Justice for its response to Hamas's terrorist attack on October 7, 2023. While condemning Hamas's act, Lula added that the attacks did not justify Israel's "indiscriminate, recurring, and disproportionate use of force against civilians."⁹⁸

Ultimately, Brazil is more focused on its own region when it comes to stabilization efforts, and is reluctant to criticize lapses in other countries' human rights practices.⁹⁹ From 2004 to 2013, Brazil undertook its

largest peacekeeping mission ever through the United Nations Stabilization Mission in Haiti. Through Operation Acolhida, the Brazilian army has employed its military forces since 2018 to protect and provide humanitarian aid to thousands of Venezuelans along the two countries' shared border.¹⁰⁰

India

India continues to emerge as an increasingly important global player. It does not view itself as a middle power, but as an emerging great power—and seeks to use and transform elements of the current international order to attain that status. India's economic and demographic growth have fueled its global influence, making it an increasingly strong military and economic partner of the United States. It claims the world's largest population—more than 1.4 billion—and is the world's fifth-largest economy, expanding by 6 to 7 percent a year and on track to be third largest by 2027.¹⁰¹

The country's rising wealth has lent it more geopolitical heft. India is a member of the BRICS bloc, the largest emerging economy in the G20 after China, and it plays a key role in trade and climate negotiations. India also participates in the Quad, the implicit effort of Australia, Japan, and the United States to balance China. It has taken on leadership roles in multilateral institutions, including chairing the G20 summit in New Delhi in September 2023, and is engaged in new economic frameworks like the I2U2 Group, a minilateral partnership that includes India, Israel, the United Arab Emirates, and the United States.¹⁰²

India seeks a constructive relationship with Russia, which remains a major military and economic partner for New Delhi. At a 2023 event in Moscow, Indian Foreign Minister Subrahmanyam Jaishankar went so far as to praise the two countries' relationship as "exceptional" and the "one constant in world politics."¹⁰³ More than 50 percent of India's in-service military platforms come from Russia. India also surpasses any other country receiving Russian arms exports, and its purchases include the S-400 missile defense system.¹⁰⁴ Following Russia's invasion of Ukraine, India took advantage of newly discounted Russian oil and sharply increased its imports. By July 2024, India overtook China as the world's largest importer of Russian oil, which made up a record 44

percent of India's overall imports.¹⁰⁵ The leaders of the two countries meet regularly; in summer 2024, Prime Minister Narendra Modi visited Russia for the first time in five years, petting horses and walking alongside Vladimir Putin less than 24 hours after a brutal Russian attack on a children's hospital in Ukraine.¹⁰⁶

Despite this history, India and Russia are experiencing what some experts term a "managed decline" of the bilateral relationship.¹⁰⁷ Though robust military ties persist, the proportion of military hardware that India imports from Russia dropped from 76 percent between 2009 and 2013 to 36 percent between 2019 and 2023.¹⁰⁸ New Delhi has downplayed its participation in Russia-centric forums, such as the Shanghai Cooperation Organization, with Modi neglecting to attend the July 2024 SCO summit.¹⁰⁹ India has not openly provided military support to Russia during the ongoing war in Ukraine, and has remained politically neutral between Moscow and Kyiv.¹¹⁰

India is, however, increasingly aligned with the United States and harbors similar concerns about



Russian President Vladimir Putin and Indian Prime Minister Narendra Modi meet at the Novo-Ogaryovo state residence outside Moscow on July 8, 2024. Modi's visit highlighted New Delhi's sustained relationship with Moscow—even in the wake of the West's ostracization of Russia. (Sergei Bobilyov/Pool/AFP via Getty Images)

China's rise and behaviors. This is despite its significant trade partnership with China and a recent thaw in the two countries' persistent border dispute.¹¹¹ Washington recognized India as a major defense partner in 2016, a status at that time unique to New Delhi.¹¹² In June 2023, Biden hosted Modi for a state visit, where the two leaders announced a historic agreement for the United States and India to co-produce jet engines for fighter aircraft.¹¹³ The United States became India's top trading partner in 2022, surpassing China and accounting for 11.5 percent of total Indian trade.¹¹⁴

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The two countries' cooperation also extends to freedom of navigation, infrastructure connectivity, supply chain resilience, and trusted technology.¹¹⁵ In 2020, New Delhi and Washington signed the Basic Exchange and Cooperation Agreement, which allows for sharing sensitive geospatial data to boost the accuracy of India's automated hardware systems.¹¹⁶ In 2023, they announced the Initiative on Critical and Emerging Technologies (iCET)—renamed under the Trump administration to Transforming the Relationship Utilizing Strategic Technology (TRUST)—which aims to expand bilateral technology and defense cooperation.¹¹⁷ Modi traveled to Washington less than a month into Trump's second term. During the visit, the U.S. president announced expanded military sales to India, including F-35 jets, as well as increased oil and gas exports.¹¹⁸ Despite residual tensions around immigration and the trade deficit, warm ties between the two leaders bode well for short-term relations.

TERRITORY. New Delhi has recently been involved in two territorial disputes, one with China and another with Pakistan. Beginning in 2020, the simmering border tensions between China and India erupted into a series of troop clashes. Though officials reached an agreement to reduce tensions and resume patrolling activities in late 2024, mutual mistrust and China's deepening military presence in the Indian Ocean ensure that bilateral tensions will endure.¹¹⁹

China also continues to provide security assistance to Pakistan, engendering anxiety in India about Beijing's aims.¹²⁰ India's conflict with Pakistan over the Kashmir region dates to 1947, when British India was partitioned. The two sides have fought four wars since then, three of them over Kashmir, and experienced multiple military crises that have brought them to the brink of war. The April 2025 terrorist attack in Kashmir that killed 26 Hindus, mainly tourists, again led to a crisis between India and Pakistan as the two countries exchanged military strikes.¹²¹ With disputes on both sides of India's borders, Indian strategists' greatest concern is avoiding a situation in which the country could be forced to fight a two-front war simultaneously against Pakistan and China.

Driven by its desire to retain economic and military benefits from Russia, India has refused to outright condemn Russia's illegal invasion of Ukraine and abstained from key votes at the UNSC on the subject. Its reluctance to punish Russia for the war drew the ire of the United States and its allies, who hoped that the world's largest democracy would take a more principled stand.¹²²

When it comes to China's violations of the maritime order in the South China Sea, however, India's position has largely aligned with that of the United States and its allies. In 2016, for example, following the Permanent Court of Arbitration's ruling against China in the Philippines' favor, India tepidly supported the ruling. India's condemnation of China's actions has since become more vocal and been complemented by joint sails in the South China Sea, increased military exercises, and the provision of military equipment to several Southeast Asian countries, including cruise missiles to the Philippines.¹²³ In its favor, India can point to the contrast with its own arbitration case involving Bangladesh, where India abided by an adverse ruling to resolve both a maritime and land boundary dispute with its neighbor.¹²⁴ The achievement has led to large infrastructure investment, growing connectivity, and greater trade between the two countries.

TRADE. India has increasingly expressed skepticism about the merits of unfettered trade liberalization, pursuing industrial policy at home and reorienting its trade policy abroad.¹²⁵ India chose not to join the 2020 RCEP, blaming the agreement's failure to incorporate its concerns, including fears of Chinese

dumping in India.¹²⁶ India also engages in extensive blocking tactics in the WTO that have further hobbled the flagging institution, much to the frustration of its fellow global south countries. It opposes progress on issues including e-commerce, fisheries, and dispute settlement, while at the same time demanding special concessions on agriculture.¹²⁷

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Despite the corrosion of the WTO and the global trading system, India is increasingly integrated with global value chains. The India–Middle East–Europe Economic Corridor, announced on the sidelines of the 2023 G20 summit, signals India’s interest in global trade opportunities. The project was designed to connect the Middle East with Europe and India through a trade corridor and allow New Delhi to counterbalance China’s Belt and Road Initiative in the region—though its implementation is uncertain in the wake of the war in Gaza.¹²⁸

FINANCE. While frustrated by the lack of institutional reform, India remains active within the financial order. It has coordinated with the IMF during regional financial crises and used its G20 presidency to advocate for international cooperation and reforms.¹²⁹ When India offered the largest bilateral loan package in its history to assist Sri Lanka, it consulted with the Paris Club—an informal group of official creditors who address debtor countries’ payment difficulties—and adhered to its standards.¹³⁰ With the limitations of the BRICS New Development Bank and the AIIB ever more apparent, India has also begun working more with the United States to rejuvenate the World Bank to ensure that it can address climate, digital, and infrastructure issues.¹³¹

New Delhi remains nominally interested in non-dollar trading mechanisms, a rare area of serious conversation involving the BRICS. India views alternatives to the dollar as a way to ensure systemic resilience in the international financial order,

including immunizing it from U.S. sanctions.¹³² Dollar supremacy also has strategic implications for India, including limiting its ability to engage Russia and Iran economically. However, after Trump threatened 100 percent tariffs on BRICS countries if they attempted to replace the dollar, the head of India’s central bank made clear that his country was not pursuing a policy of de-dollarization.¹³³ India’s private sector is also unlikely to risk secondary sanctions, given its exposure to Western markets, but may seek workarounds on issues including Indian investments in a container port terminal at Chabahar in Iran, or financing oil trade with Russia.¹³⁴

NONPROLIFERATION. Though it rhetorically supports global nuclear disarmament, India possesses nuclear weapons of its own and is not party to the NPT or the CTBT. It has criticized the current order as discriminatory against non-nuclear weapons states and was itself a pariah of the nonproliferation order for decades.¹³⁵

That changed after 2008, when India negotiated a civil nuclear agreement with the United States that effectively reintroduced it into the nuclear mainstream. India is a member of three of the four major export control regimes—the Wassenaar Group, the Australia Group, and the Missile Technology Control Regime.¹³⁶ Yet its exclusion from the Nuclear Suppliers Group, largely as a consequence of China’s refusal to endorse India’s entry, prevents its full integration into the current nonproliferation order.

More worryingly, China’s expanding nuclear weapons arsenal could place pressure on India to enhance its own capabilities or to conduct another nuclear test.¹³⁷ China’s modernization efforts appear primarily focused on challenging the United States, but India is concerned about the consequences for its own nuclear security. India has traditionally taken an approach guided by a survivable second-strike capability, but China’s buildup may open the aperture for debate about India’s future nuclear posture. Questions about the survivability of a sea-based deterrent have added to concerns. The possible debate on India’s nuclear doctrine and posture would have consequences for the wider nonproliferation order.¹³⁸

HUMAN RIGHTS. India is party to six of the nine core human rights treaties and is a co-founder of the UN Democracy Fund (UNDEF), which financially supports civil society organizations that operate in

countries experiencing political transitions.¹³⁹ As of 2022, it had contributed more than \$32 million to the fund, and New Delhi remains the UNDEF's second-largest donor.¹⁴⁰ It has participated in each Summit for Democracy, at one of which Modi claimed that "India has an ancient and unbroken culture of democracy."¹⁴¹ Despite maintaining a relatively neutral stance on the war in Ukraine, India strongly condemned civilian killings in Bucha in 2022.¹⁴²

India's participation in the human rights order, is, however, overshadowed by the recent sharp decline in its own democratic record. In 2021, Freedom House downgraded India's score from "free" to "partly free," citing increased violence and discriminatory policies targeting the Muslim population.¹⁴³ Unlawful detentions and restrictions on free speech have increased, and researchers have identified some 250 non-violent political prisoners jailed without formal charges or trials between May 2014, when Modi came to power, and July 2022.¹⁴⁴ Modi's government has broadly cracked down on free speech and the media, including banning a 2023 BBC documentary on Modi's role during Gujarat's deadly 2002 communal riots. The 2024 Citizenship Amendment Act has been criticized for favoring non-Muslims fleeing religious persecution.¹⁴⁵ Some democracy organizations now categorize India as a "hybrid regime"—neither fully autocratic nor democratic.¹⁴⁶

New Delhi's record abroad has grown patchy as well. With an eye on China, India has maintained ties with and sold weapons to the junta that ousted Myanmar's democratic government in 2021 and failed to protect the rights of fleeing Rohingya refugees. It abstained, along with China and Russia, from a UNSC vote demanding an immediate end to the violence in Myanmar in December 2022.¹⁴⁷ In line with its long-held position that country-specific human rights resolutions are ineffective, India also abstained from a vote in 2022 condemning China's atrocities in Xinjiang. India's slide toward extrajudicial violence, including killings in Canada and an assassination plot in the United States, were especially concerning.¹⁴⁸

Indonesia

Located at the nexus of the Indian and Pacific Oceans, and with the largest economy in Southeast Asia, Indonesia is the world's third-largest democracy and

an influential global player. It is the sixth-largest emerging market by GDP and has grown faster in the past decade than any other \$1 trillion-plus economy except China and India.¹⁴⁹ It is a founding member of the Association of Southeast Asian Nations and generally considers itself a leader of the organization and the region.

Indonesia was a founding member of the non-aligned movement and has since become more comfortable with the idea of playing an active role mediating between great powers and middle powers. Its strategy today can be better defined as multi-aligned. For example, in 2023 it joined the G20's other middle powers to form a bridging initiative with Mexico, South Korea, Türkiye, and Australia (MIKTA). Indonesia has applied for membership in the Organisation for Economic Co-operation and Development (OECD), participates in the China-dominated RCEP, and officially became a member of the BRICS in January 2025.

These choices—especially the latter cases—are driven primarily by economic pragmatism regarding China. China is both Indonesia's largest trading partner and its second-largest foreign investor.¹⁵⁰ Chinese companies and people dominate important Indonesian industries, from nickel mining to tourism.¹⁵¹ The Chinese Tsingshan Holding Group established the largest stainless-steel production base in the world in Indonesia, and Chinese brands lead the smartphone industry.¹⁵² Such factors encouraged the two countries to upgrade to a comprehensive strategic partnership in 2013. Following a visit to China in November 2024 by newly inaugurated President Prabowo Subianto, China and Indonesia issued a joint statement that highlighted their partnership and projected greater development cooperation.¹⁵³

Before taking office in October 2024, Prabowo declared that Indonesia considered "Russia as a great friend," and said that he would work to maintain and enhance the relationship.¹⁵⁴ Yet Russia's primary avenue for engagement with Indonesia is through a transactional military relationship, and the Kremlin has little soft power influence in Indonesia.¹⁵⁵

If China is its primary economic partner, the United States is Indonesia's prime strategic partner.¹⁵⁶ The United States and Indonesia have a long history of cooperation and elevated their relationship to a comprehensive strategic partnership in November

2024.¹⁵⁷ The two countries have a robust trade relationship. The absence of a multilateral U.S. trade agenda in Asia, including the United States' failure to accede to the TPP, has weighed heavily on perceptions of the United States.¹⁵⁸ Policymakers viewed the Biden administration's Indo-Pacific Economic Framework as an insufficient alternative due to its failure to include access to the U.S. market, and overall U.S. investment in Indonesia has wavered in recent years.¹⁵⁹

When it comes to security, however, Indonesia views the United States as an essential partner. The two countries hold more than 220 defense activities each year, and Jakarta relies on Washington for the majority of its training and equipment.¹⁶⁰ In 2021, the

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United States began funding the construction of the now-open maritime training center Anambas on the strategic Indonesian island of Batam; as of January 2025, the United States had \$1.88 billion in active government-to-government cases with Indonesia under Foreign Military Sales.¹⁶¹

TERRITORY. Indonesia has traditionally placed a high value on the principles of territorial integrity and sovereignty. Nevertheless, Jakarta failed to stand up firmly in support of Ukraine after Russia's illegal invasion. Though it supported early UN resolutions condemning the invasion, then-President Joko Widodo stated only two weeks after the invasion that both "Ukraine and Russia are friends of Indonesia."¹⁶² Indonesia placed higher value on "rowing between two reefs" and charting a middle path between great powers than on criticizing Russia's actions.

Indonesia adheres more closely to the current order in the maritime domain. After increasing Chinese incursions into the South China Sea, Jakarta mobilized fishermen to join warships to help defend against Chinese vessels in 2020.¹⁶³ In 2023, then-Defense Minister Prabowo met with his U.S. counterpart Lloyd Austin, publicly agreeing that the People's Republic of China's (PRC) expansive maritime claims in the South China Sea do not align with international law.¹⁶⁴ Indonesia's interpretation of UNCLOS looks

more like China's and Vietnam's than Washington's in denying the right of passage to military vessels within the country's exclusive economic zone, but it has not interfered with freedom of navigation in practice.¹⁶⁵

TRADE. Jakarta has benefited remarkably from its participation in global trade over the past 20 years. Despite signing a series of bilateral free trade agreements, however, Indonesia's implementation of them is spotty.¹⁶⁶ Jakarta joined RCEP, which entered into force in Indonesia in January 2023.¹⁶⁷ However, Indonesia appears uninterested in other high-quality free trade agreements such as the CPTPP and is weakly committed to high-quality labor and environmental standards.

Indonesia has also come into conflict with the WTO. After Jakarta imposed a ban on the export of raw nickel, the EU challenged the action through the WTO dispute panel, which ordered Indonesia to remove its export restrictions. Jakarta refused to do so, choosing instead to expand the ban to other unprocessed minerals.¹⁶⁸ Rather than supporting the existing trade order, Indonesia's trade policy vacillates between openness and protectionism depending on the issue and Indonesia's political interests.¹⁶⁹

FINANCE. Jakarta has endorsed open capital markets and an open financial system, and it seeks to join multilateral organizations such as the OECD. Finance Minister Sri Mulyani Indrawati said that the "IMF and World Bank are based on the belief that cooperation provides better results for everyone," recognizing that Indonesia has benefited from both institutions over the past 30 years.¹⁷⁰ At the same time, Indonesian delegates at the 78th United Nations General Assembly called for reform of the "outdated and unsuitable" international financial architecture.¹⁷¹ Both perspectives represent Indonesia's take on the current financial order—it is one the country has profited from and, at times, found discriminatory against the voices and interests of developing countries.

Jakarta has proposed what it calls "innovative financing" in which public-private partnerships play a more significant role in development. In February 2025, it received its first sustainability-linked loan from the International Financial Corporation, an element of the World Bank Group and the largest global development institution focused on the private sector in emerging markets.¹⁷²

NONPROLIFERATION. Indonesia is a model nuclear citizen, having signed the IAEA's Additional Protocol as well as a separate bilateral accord with the United States on nuclear safeguards and security. Former Indonesian Deputy Defense Minister Muhammad Herindra affirmed in 2023 that the United Nations' TPNW will help achieve "comprehensive disarmament" and better maintain peace by eliminating the possibility of nuclear war.¹⁷³ Indonesia has since ratified the treaty, which came into force in December 2024.¹⁷⁴ Indonesia also supports regional nonproliferation efforts through the 1997 Southeast Asian Nuclear Weapons Free Zone Treaty.

Indonesia initially met the announcement of AUKUS with suspicion, driven by the prospect of Australia becoming the first non-nuclear weapons state to develop nuclear-powered submarines. Former Foreign Minister Retno Marsudi affirmed the need for the deal to stay true to the Non-Proliferation Treaty. Then-Defense Minister Prabowo stated in 2021 that he understood and respected AUKUS.¹⁷⁵ By 2023, Jakarta had issued a joint statement with Australia committing to strengthening the global nuclear non-proliferation and disarmament regime.¹⁷⁶

HUMAN RIGHTS. Indonesia's commitment to the human rights order is inconsistent. In 2008, then-President Susilo Bambang Yudhoyono established the Bali Democracy Forum. The forum was intended to foster "democracy, human rights, equality and mutual respect," but has since taken a back seat on the government agenda.¹⁷⁷ In 2009, Indonesia led the establishment of the ASEAN Intergovernmental Commission on Human Rights, which promotes regional human rights protection in the region. Jakarta has also invested resources to address the ongoing crisis in Myanmar, both as ASEAN chair in 2023 and otherwise. Indonesian officials emphasized that through ASEAN, Jakarta would encourage the end of the conflict in Myanmar and expressed support for UNSC sanctions in response to the conflict.¹⁷⁸

Though it has attempted to position itself as pro-democracy globally, Indonesia has experienced steady democratic backsliding and a tilt toward authoritarianism domestically. In 2017, Indonesia fell 20 places in the Economist Group's Democracy Index, from 48th to 68th, making it the worst performer among the 165 countries surveyed.¹⁷⁹ It passed a new criminal code in December 2022 that reportedly

violated international human rights standards, and it has violently repressed protests in the Papua and West Papua provinces.¹⁸⁰ President Prabowo, elected in 2024, has a personal history of human rights abuses in the 1980s and 1990s.¹⁸¹

Saudi Arabia

Under Crown Prince Mohammed bin Salman (MBS), Riyadh explicitly wishes to be multi-aligned and is trying to recast itself on the international stage as a global influencer. Its economic growth and efforts to diversify its economy following reforms in 2016, along with the implementation of MBS's "Vision 2030," have enabled Saudi Arabia to emerge as a key middle power able to shape a changing global order.

Saudi Arabia is a significant contributor to global oil markets, with around 17 percent of the world's petroleum reserves, and serves as the de facto leader of the Organization of the Petroleum Exporting Countries (OPEC) and OPEC+, which links the group with 10 other oil-producing countries.¹⁸² The Kingdom's GDP reached \$1 trillion for the first time in 2022, and the country is actively diversifying its economy into areas such as infrastructure, tourism, and technology.

On an increasingly competitive global stage, Saudi leadership seeks to diversify its relationships with major powers. Riyadh has sought to strengthen its partnership with China, which has a mutual desire to do so. The two have taken multiple steps, especially since 2016, to align their priorities—including signing a number of economic agreements and establishing the High-Level Joint Committee to develop cooperation strategies based on the Belt and Road Initiative and Vision 2030.¹⁸³ In 2022, King Salman signed a comprehensive strategic partnership agreement with Xi, alongside a series of deals that deepened relations with China—including one with Huawei Technologies on cloud computing and the construction of high-tech complexes in Saudi cities.¹⁸⁴ In 2023, China hosted the announcement of a Saudi-Iran agreement to restore diplomatic relations following a bitter seven-year dispute.¹⁸⁵ The BRICS group agreed in 2024 to invite Saudi Arabia to join the organization, alongside Iran and Egypt.¹⁸⁶ Saudi Arabia is reportedly negotiating arms deals with China as it seeks to diversify its supply in the wake of the Ukraine war.¹⁸⁷ Riyadh is also interested in a binding security guarantee from the

United States, as part of a package deal to normalize ties with Israel, and has threatened to turn toward China if no such treaty is in the offing.¹⁸⁸

Saudi Arabia's balancing strategy assumed prominence in the wake of Russia's invasion. Though Riyadh voted in favor of the UN General Assembly resolution condemning Russia's invasion of Ukraine, it has since sought a position of neutrality in the war.¹⁸⁹ Despite U.S. entreaties, Saudi Arabia refused to raise oil production to mitigate the energy crisis driven by the conflict. OPEC+ instead cut two million barrels a day in a 2022 agreement that has been extended multiple times.¹⁹⁰ The Biden administration accused the Kingdom of moving to benefit Russian revenues and blunt the effectiveness of sanctions.¹⁹¹

Like multiple other swing states, Saudi Arabia sees itself as well positioned to mediate an end to the war in Ukraine. In September 2022, Saudi Arabia worked with Türkiye to execute a prisoner swap between Russia and Ukraine involving nearly 300 people.¹⁹² In August 2023, it hosted representatives from more than 40 countries at a two-day peace summit.¹⁹³ When the Trump administration made a diplomatic push for a Ukraine peace deal, Saudi Arabia hosted U.S. talks with Russia.¹⁹⁴

Though Saudi Arabia's decades-old alliance with the United States was once seen as ironclad, cracks have appeared over the past decade. Riyadh is still dependent on Washington for its security, purchasing nearly 79 percent of its arms and almost 100 percent of its high-grade advanced weaponry from the United States.¹⁹⁵ Commercial ties between the countries continue to grow in new sectors. Just after

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China announced the deal to reinvigorate Saudi-Iran ties, Saudi Arabia signed a major deal with U.S. aircraft manufacturer Boeing and doubled down on efforts to seek bilateral security guarantees from the United States.¹⁹⁶ Thousands of U.S. military personnel remain deployed in the Kingdom, charged with protecting U.S. regional interests against Iran, and a bilateral agreement for internal security force

training was renewed in 2023.¹⁹⁷ Saudi confidence in the U.S. security guarantee has, however, been shaken in recent years. During his first term, Trump neglected to retaliate after an attack by Iran crippled Saudi Arabia's most critical oil installation, sowing doubt about the U.S. commitment to Saudi security.¹⁹⁸ President Biden then entered office pledging to render Saudi Arabia an international pariah after its assassination of journalist Jamal Khashoggi.

Nevertheless, President Trump made Saudi Arabia the first stop on his inaugural presidential trips to the Middle East in each of his terms. Trump's May 2025 visit focused on deepening U.S.-Saudi economic ties, and his trade wars and proposed tariffs have not appeared to dampen Saudi enthusiasm for linking its economic growth to the United States. Riyadh maintains sway with Washington, and Trump publicly credited MBS with persuading the president to lift sanctions on Syria after Bashar al-Assad's regime fell.¹⁹⁹

TERRITORY. Riyadh positions itself as a status quo power within the territorial order. For instance, Riyadh voted in favor of the UN General Assembly resolution condemning Russia's unilateral annexation of Ukrainian territories.²⁰⁰ Saudi officials also expressed support for the territorial integrity of Syria following the collapse of the Assad regime.²⁰¹

Though it is not a signatory of the UNCLOS, Saudi Arabia has a track record of upholding the convention's norms, including by ensuring freedom of navigation in the Red Sea and Arabian Gulf.²⁰² Saudi Arabia has also aligned with multilateral coalitions to prevent disruptions to global trade and energy supplies, including in strategic chokepoints such as the Bab el-Mandeb.²⁰³

TRADE. Saudi Arabia's significant role in the global trade order is shaped by its participation in multilateral institutions, integration into global value chains, and strategic economic transformation under Vision 2030. As a WTO member since 2005, the Kingdom has formally committed to the principles of commercial reciprocity, nondiscrimination, and trade liberalization, embedding itself within the institutional architecture that governs global commerce.²⁰⁴

Though Saudi Arabia largely complies with trade regulations, it has a history of exploiting the international oil market for its economic and political advantage. The Kingdom accounted for about 11

percent of the world's oil production in 2023—second only to the United States—and takes advantage of that fact.²⁰⁵ While the Kingdom's official energy policy aims at a “fair” price for both producers and consumers, its actions do not always align with the objective; Riyadh has, for example, manipulated oil prices to prevent U.S. shale from becoming a viable competitor.²⁰⁶ Saudi Arabia recently explored the idea of pricing its oil trade with China in yuan over dollars, which would send shockwaves through world petroleum markets and challenge the current dollar-based trade order.²⁰⁷

At the same time, Saudi Arabia has taken steps through Vision 2030 to implement regulatory reforms in customs procedures, taxation, and investment liberalization, indicating a shift toward greater compliance with the existing trade order.²⁰⁸ The Kingdom has attracted more than 540 multinational companies to establish regional headquarters in Riyadh as part of its economic diversification strategy, embedding itself into global investment and trade networks.²⁰⁹ Saudi Arabia has attempted to create greater integration and trade opportunities with neighboring countries, including by forming free trade zones. Through its membership in the Gulf Cooperation Council, which instituted a customs union in 2003, Riyadh has also managed to expand trade and lower barriers in the region.²¹⁰

FINANCE. Saudi Arabia is an active participant in multilateral financial institutions, including the IMF, World Bank, and G20. It engages in IMF-led funding programs in the Middle East, works through the World Bank to support development financing and expand its economic diplomacy in the global south, and coordinates energy security and macroeconomic policy through the G20.²¹¹

Despite increasing speculation regarding Saudi Arabia's long-term financial trajectory, particularly regarding de-dollarization and engagement with alternative financial structures such as the BRICS, data indicate that the Kingdom remains structurally embedded in the U.S.-led financial order.²¹² While Saudi Arabia has increasingly expanded trade ties with China and other emerging economies, these relationships have yet to materialize in a significant financial reallocation. U.S. dollar-denominated assets remain dominant in the Saudi Public Investment Fund's (PIF's) foreign currency holdings, rising from

\$130.8 billion in 2022 to \$165.2 billion in 2023 and accounting for more than 35 percent of total investment securities.²¹³

In 2022, China marked its first renminbi trade with Saudi Arabia.²¹⁴ Saudi Finance Minister Mohammed al-Jadaan subsequently announced that Saudi Arabia would consider currencies other than the U.S. dollar in oil contracts.²¹⁵ However, despite deepening trade relations with China and other emerging markets, Saudi Arabia's financial structure remains overwhelmingly tied to the U.S. dollar and Western capital markets. Saudi flirtation with de-dollarization is more likely used as a bargaining tool to secure wavering U.S. security guarantees.

NONPROLIFERATION. Saudi Arabia has been a signatory of the Non-Proliferation Treaty since 1962 and works with the IAEA to enhance international nuclear safeguards. In September 2024, Saudi Arabia rescinded the Small Quantities Protocol and committed to implementing a full-scope Comprehensive Safeguards Agreement, enhancing IAEA oversight.²¹⁶

However, Riyadh's commitment to nonproliferation ultimately hinges on regional stability and Iran's nuclear program.²¹⁷ Saudi officials have stated that while the Kingdom remains committed to nonproliferation, a fundamental shift in Iran's nuclear status would require a reassessment of its strategic options. The crown prince said, “Saudi Arabia does not want to acquire” nuclear weapons, but “if Iran developed a nuclear bomb, we will follow suit as soon as possible.”²¹⁸ Before negotiations were paused due to Hamas's attack on Israel, MBS was willing to trade a Saudi embassy in Israel for a mutual defense treaty with Washington and a U.S.-provided civilian nuclear program.²¹⁹

The late King Abdullah bin Abdulaziz and former Chinese Premier Wen Jiabao first came to an agreement in 2012 to develop a Saudi nuclear energy program. Saudi Arabia has since constructed a nuclear research reactor near Riyadh capable of uranium and plutonium enrichment with assistance from China.²²⁰ Though it remains a healthy distance from actually developing nuclear weapons of its own, Saudi rhetoric and ambitions confine the country to the outskirts of the nonproliferation order.

HUMAN RIGHTS. Saudi Arabia is an absolute monarchy with very limited political rights and freedoms for its citizens. Despite reform efforts

through Vision 2030, which include some goals to improve women's rights and gender equality, Saudi Arabia's human rights record remains weak both domestically and abroad. Vision 2030 makes no mention of human rights or democratic reform, and a leaked draft of Saudi Arabia's first written penal code criminalizes the rights to freedom of expression, thought, and religion and fails to protect the right to freedom of peaceful assembly.²²¹

Human rights groups have expressed concern about a lack of freedom of expression, arbitrary detentions, unfair trials, and harsh sentences carried out against children or people who were children when they committed crimes.²²² The regime carried out the brutal murder of Jamal Khashoggi in 2018, an act that drew international condemnation.²²³ Saudi border guards also killed hundreds of Ethiopian migrants and asylum seekers attempting to cross the Yemen-Saudi border between March 2022 and June 2023, amounting to what one group said might be crimes against humanity.²²⁴

South Africa

South Africa is a dominant political and security actor on the African continent. It is also, increasingly, a global player—the only African country that is a member of the G20 (along with the African Union itself), an aspiring permanent UNSC member, and an active BRICS member. It has the highest per capita gross domestic product of any large African country.²²⁵

South African leaders chafe under the current international order and explicitly seek a world in which power is more evenly distributed and inclusive of the global south. The African National Congress (ANC), which has led all post-apartheid governments, speaks of liberation for oppressed nations from an unjust, Western-dominated international order, one riven by hypocrisy and double standards. Former Minister of International Relations Naledi Pandor argued that “international law begins to mean nothing” when it is inconsistently implemented, and that South Africa wants to “revise the international multilateral system” to be more representational.²²⁶ To this end, it advocates for reform of the core postwar and Bretton Woods institutions and supports the development of new regional and global organizations. Less than 5 percent of South Africans surveyed in 2024

supported the status quo in the UNSC, and South African President Cyril Ramaphosa himself demanded and required that his country “should have serious participation on the UN Security Council.”²²⁷ South Africa also advocated for enlarging the BRICS at the group's summit in 2023.²²⁸

South Africa has increasingly asserted its voice on the international stage in quite controversial ways. In October 2024, South Africa took Israel to the International Court of Justice on claims of genocide in Gaza—a choice that earned severe backlash from the United States and other countries. Pretoria has offered to mediate the Russia-Ukraine conflict and led an African peace delegation to Russia and Ukraine in 2023.²²⁹ Putin accepted and encouraged Ramaphosa's “dual mediation role.”²³⁰ South Africa is hosting the G20 in 2025, an opportunity to showcase its foreign-policy goals—though the U.S. boycott of South Africa-hosted G20 events has put a damper on its ability to do so.²³¹

The ANC, which has long formed the core of the South African political establishment, sees itself as



South African President Cyril Ramaphosa addressed the media after talks during a visit to Kyiv on June 16, 2023. He visited as part of a delegation offering to broker peace between Kyiv and Moscow. (Sergei Supinsky/AFP via Getty Images)

firmly nonaligned and has long been dedicated to this position—in theory.²³² In a 2024 *Washington Post* op-ed, Ramaphosa reaffirmed the policy, writing: “Since 1994, democratic South Africa has deliberately avoided aligning itself with any of the major powers or blocs.”²³³ In practice, however, the country’s political elite remains dominated by the generation that fought against apartheid, and its political sympathies align with its historical friends during the struggle. China and the Soviet Union supported the anti-apartheid movement when Western countries failed to condemn or even supported the apartheid regime.²³⁴ This is changing, slowly—the Western-leaning Democratic Alliance formed the country’s first coalition government with the ANC after winning an unprecedented number of votes in May 2024.²³⁵ South Africa’s recent history, however, continues to weigh heavily in its current foreign policy and to shape its posture toward global powers.

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This is especially true of Russia. Much of the establishment in South Africa retains an affinity for the Soviet Union, which supplied arms to the ANC’s liberation movement and spoke out against the apartheid regime.²³⁶ In 2013, South Africa signed a comprehensive strategic partnership deal with Russia that lays out a framework for cooperation between the two nations.²³⁷ The agreement stipulates that neither country will challenge or condemn the other, a principle that has shaped South African–Russian relations for the past decade.²³⁸

Its loyalty has led South Africa to take actions that not only imperil its relations with the United States but also erode tenets of the rules-based order. Despite initially criticizing Russia’s unlawful invasion of Ukraine, South Africa has since become reticent to comment on the conflict. South Africa was among 32 countries to abstain from a February 2023 resolution on Ukraine.²³⁹ That same month, near the first anniversary of the Russian invasion, South Africa participated

in a 10-day naval exercise in the Indian Ocean along with the Russian and Chinese navies. A U.S. embassy spokesperson criticized South Africa’s participation in the exercise “even as Moscow” continued “its brutal and unlawful war of aggression against Ukraine.”²⁴⁰ The U.S. ambassador to South Africa, Reuben Brigety, subsequently accused the country’s government of providing weapons and ammunition to Russia by allowing a sanctioned Russian ship—the *Lady R*—to dock near Cape Town.²⁴¹ The incident erupted in diplomatic scandal and, if accurate, would affirm South Africa’s support for a country actively engaging in territorial aggression.

South Africa’s relationship with China is primarily economic, although the two countries have also grown closer politically in recent years—notably through the BRICS forum. In China, Pretoria sees a country that is a far more relevant model of development than the example provided by Western nations.²⁴² After taking office in 2013, Xi’s first international trip was to South Africa. After three more visits across the next five years, South Africa became the first African country to sign a memorandum of cooperation with China on the Belt and Road Initiative.²⁴³ As of March 2025, China is South Africa’s largest trading partner, representing just under 11 percent of exports and 19 percent of imports.²⁴⁴ Ramaphosa has criticized American efforts to constrain the Chinese technology conglomerate Huawei, and in July 2023 opened a new Huawei Innovation Center in Johannesburg, stating that the center would help South Africa “leapfrog into the Fourth Industrial Revolution.”²⁴⁵ South African policymakers tend to view China not only as an economic opportunity, but also as an important counterbalance against a domineering, U.S.-led world order.²⁴⁶

These developments have strained what has been, since democratic elections in 1994, a strong political and economic relationship between the United States and South Africa. Under the Biden administration, tensions came to a head after the *Lady R* incident when a bipartisan group of lawmakers suggested that the United States should reassess whether South Africa was eligible to retain trade benefits under the African Growth and Opportunity Act (AGOA).²⁴⁷ Lawmakers accused South Africa of using its “stance of nonalignment in international affairs to justify increasingly close relations with the PRC and Russia,”

and called for the U.S. government to review the status of the United States–South Africa bilateral relationship.²⁴⁸ South Africa responded by inundating Washington with diplomatic delegations, attempting to smooth over the spat by drawing attention to the importance of the bilateral economic relationship.²⁴⁹ But the perception that Pretoria favors Russia and China’s vision for the world stands—and diplomatic relations have plummeted to new lows under the Trump administration.

Trump early in his term suspended all U.S. development aid to South Africa, accusing the government of subjecting white Afrikaners to “race-based discrimination” and offering asylum to white South Africans.²⁵⁰ The newly installed secretary of state, Marco Rubio, snubbed the G20 foreign ministers meeting in South Africa in February 2025 and declared that he would not attend the G20 summit in Cape Town in September 2025.²⁵¹ After South African Ambassador to the United States Ebrahim Rasool accused Trump of leading a white supremacist movement, he was declared *persona non grata* and expelled from the United States in late March 2025.²⁵² The current trajectory for relations is poor and will need a 180 degree reset to become productive again.

TERRITORY. South Africa has traditionally supported a policy of nonintervention and is a signatory of UNCLOS, having ratified it on December 23, 1997.²⁵³ However, in the wake of Russia’s invasion of Ukraine, South Africa failed to condemn Russia’s violation and abstained from all General Assembly votes to condemn Russia’s invasion. It has resisted pressure from Washington for Pretoria to condemn or even curtail its ties with Moscow. In response to U.S. criticism of this reticence, South African experts and officials frequently turn the conversation around and accuse the United States of hypocrisy in its approach to Israel and the Palestinians. Former Foreign Minister Pandor claimed that U.S. officials do not “believe in international law, truly” but rather “use the framework of international law unequally depending on who is affected.”²⁵⁴

TRADE. South Africa supports free trade and is party to multiple international and regional trade agreements and institutions. It joined the GATT in June 1948 and has been a WTO member since January 1995. The AGOA provides South Africa with duty-free access to more than 1,800 products in the U.S.

market.²⁵⁵ Pretoria joined the African Continental Free Trade Area in January 2024 and began trading under its terms soon thereafter.²⁵⁶

South African leaders regularly complain about the deleterious effects of trade barriers, non-tariff barriers, and trade-distorting practices used by great powers including the United States and China.²⁵⁷ To remedy this imbalance, reforming the WTO and developing a more equitable trade system are two of South Africa’s priorities. Speaking at the 14th BRICS Trade Ministers Meeting in Moscow in July 2024, Deputy Minister Zuko Godlimpi stated, “South Africa supports the strengthening of the multilateral trading system and the WTO reforms that promote development.”²⁵⁸

FINANCE. As a leader in the global south, South Africa has made clear its efforts to reform the international financial system, including the IMF. It believes that global finance should be diversified and made more accessible to emerging and middle economies.

In its pursuit of alternative sources of international financing and investment, South Africa has prioritized the expansion and elevation of the BRICS as a counterweight to a Western-dominated financial order. By advocating for BRICS expansion—four countries joined the group at the 2024 summit in South Africa—Pretoria aims to create a substantial financial bloc that addresses global south concerns. The edges of this reality are beginning to take shape. In August 2024, the South African state logistics group Transnet agreed to a five-billion-rand (\$283.53 million) loan from the BRICS New Development Bank.²⁵⁹ As one of the primary funders of the New Development Bank, China will realize increased influence if it is used as an alternative to the World Bank.

NONPROLIFERATION. South Africa is the only nation to date that possessed and then voluntarily gave up its nuclear weapons, which it did in 1991. It is a vocal proponent of nonproliferation and signatory of all major nonproliferation and test ban treaties, including the Treaty on the Prohibition of Nuclear Weapons, which it signed on September 20, 2017.²⁶⁰ Since it came to power, the governing ANC party has adhered to a position supporting nuclear disarmament, nuclear nonproliferation, and the peaceful use of nuclear energy.²⁶¹ South Africa has tied its nonproliferation policy to its stance of nonalignment, rejecting all great powers’ nuclear proliferation equally.

HUMAN RIGHTS. South Africa is rightfully proud of peacefully overcoming the country's apartheid legacy. Former Foreign Minister Pandor told an audience at Georgetown University in 2023 that her country believed "human rights should be available to everybody equally and not to some," arguing that South Africa was committed to freedom, human rights, and democracy . . . all over."²⁶² Since 1994, the country has been commonly regarded as a proponent of human rights and a leader on the African continent, acting as a peacekeeper in multiple conflicts.²⁶³

However, South Africa's recent record supporting the global human rights order is patchy. Former President Jacob Zuma attempted to withdraw his country from the Rome statute and the International Criminal Court (ICC) in 2016, before the South African High Court ruled the move unconstitutional (Zuma did not get parliamentary approval).²⁶⁴ When former Sudanese President Omar Hassan al-Bashir visited South Africa the following year, South Africa failed to arrest him even though he was subject to an ICC arrest warrant.²⁶⁵

There is also a stark cognitive dissonance in South African society between support for Russia and China on the one hand, and on the other dedication to values and principles of freedom, democracy, and individual rights.²⁶⁶ It appears that South Africa's ties to China, for example, have influenced its posture toward democracy and human rights. Despite bringing its International Court of Justice case accusing Israel of genocide in Gaza—an attempt to show that human rights are a priority—it has not spoken out against China's treatment of its Uyghur population. Similarly, in July 2024, South Africa sat out a UN Human Rights Council vote to support aid for human rights initiatives in Ukraine.²⁶⁷

Türkiye

Since taking power—first as prime minister in 2003, then as president in 2014—Recep Tayyip Erdoğan has helped shape a new role for Türkiye in the world and established his country as an ambitious regional and even global power. After decades of close alignment with Europe and the United States during and after the Cold War, Türkiye has embraced a multi-aligned position firmly at the crossroads of the Middle East, the West, and Eurasia. Ankara has developed a

"360-degree foreign policy," premised on the notion that Türkiye's Western alliances do not restrain its actions in other strategic regions.²⁶⁸

Its institutional memberships range from the G20 and NATO to the Organization of the Islamic Conference. Ankara has proved a difficult NATO ally in some respects, delaying Finland's accession to the alliance and blocking Sweden's, accusing Stockholm of harboring Kurdish separatists. Türkiye's purchase of Russian S-400 air defense systems led Washington to cancel its sale of F-35 fighter aircraft to Ankara. And in recent years, Türkiye has boosted its economic ties with Russia and turned to the Kremlin for military and diplomatic support.

In 2010, Ankara and Moscow entered talks to build the \$20 billion Akkuyu nuclear power plant in southern Türkiye, which is expected to begin generating electricity in 2025.²⁶⁹ 2020 saw the completion of the \$13 billion TurkStream natural gas pipeline from Russia that runs through the Black Sea to Türkiye. After Russia's 2022 invasion of Ukraine, President Erdoğan argued that Ankara could not join Western sanctions against Moscow because his country depended on Russian oil and natural gas imports—and instead it increased its imports of Russian energy.²⁷⁰ In 2022, Russia's trade increased by 87 percent with Türkiye.²⁷¹ In November 2024, well into the war, Erdoğan expressed a desire to "increase the cooperation between Türkiye and Russia," notably by "expanding the volume of trade."²⁷²

Presidents Erdoğan and Putin have also formed a personal relationship that has positively influenced their countries' relations. The leaders' close ties emerged within the context of the failed Turkish coup attempt in 2016, after which Erdoğan's crackdown on dissent left Ankara at odds with its Western allies. Erdoğan met with Putin on his first trip abroad after the attempt, and they forged a constructive partnership.²⁷³

By seeking to join the BRICS in late 2024, Ankara reaffirmed its commitment to balancing between the West and a rising group of countries opposed to the current world order, including Russia and China. Türkiye's relationship with China is otherwise lukewarm, despite Ankara's outreach to Beijing. Türkiye's ties to and sympathy for China's Uyghur community—Türkiye is home to the world's largest Uyghur diaspora—have thus far proved a roadblock to deeper relations.²⁷⁴



Russian President Vladimir Putin, left, and Turkish President Recep Tayyip Erdoğan, right, talk onstage at the opening ceremony of the TurkStream natural gas pipeline project on January 8, 2020, in Istanbul. (Burak Kara/Getty Images)

Despite signing on to the BRI in 2015, Türkiye ranks 23rd of 80 countries receiving Chinese investment.²⁷⁵ Beijing refused to assist Ankara during the first rumblings of Türkiye's economic troubles in 2018 and instead choose Greece as a key BRI partner in the East Mediterranean.²⁷⁶ Beijing and Ankara increasingly compete for influence in Africa and Central Asia, where both see economic and geopolitical opportunity.²⁷⁷ Each of these centrifugal forces creates space between Türkiye and China that will be difficult for them to bridge.

The United States is one of Türkiye's oldest allies, but the relationship has become strained in recent years. During Syria's civil war, Washington partnered with the Syrian Democratic Forces (SDF) to fight the Islamic State threat. Ankara considers this Syrian offshoot of the Kurdistan Workers Party a terrorist group and views its presence in Syria as an existential threat.²⁷⁸ Differences over the Kurdish presence in Syria dogs the bilateral relationship to this day, though the fall of Assad's regime in Damascus may provide new opportunities for resolution. Washington has episodically expressed concern about Türkiye's domestic politics as well; the government's repression of speech and jailing of key opposition political figures suggests a turn away from democratic rule.

Some of these spats have been papered over if not resolved. The Turkish government's ratification of Sweden's membership of NATO in early 2024 led

the Biden administration to approve the sale of F-16 fighter jets to Türkiye—taking heat out of the NATO membership and S-400 disputes.²⁷⁹ The potential reintegration of the SDF into a Syrian national army, along with the possible withdrawal of U.S. troops from northeast Syria, have provided the space for diplomatic consultations. Even there, however,

The United States is one of Türkiye's oldest allies, but the relationship has become strained in recent years.

the issues remain tricky; the two NATO allies have been pitted against each other by proxy for years. During the most recent spat in December 2024, the Turkish military fired on U.S.-backed Kurdish forces in northern Syria.²⁸⁰

TERRITORY. Türkiye has been involved in ongoing disputes in exclusive economic zones off the Mediterranean coast. Ankara is widely thought to have intervened in Libya's civil war in 2020 in part to secure its preferred maritime boundaries in the Eastern Mediterranean, and as part of its Blue Homeland Doctrine—shorthand for Ankara's maritime claims in the region.²⁸¹ Before its intervention, Türkiye signed a maritime boundary treaty with Libya to establish an exclusive economic zone in the

Mediterranean Sea; this received significant push-back.²⁸² Türkiye's claims to large deposits of natural gas off the coast of Cyprus remain highly disputed. Both Greece and Cyprus argue that Ankara disregards Greek and Cypriot sovereignty.²⁸³

Despite maintaining ties with Russia, Türkiye has simultaneously helped Ukraine defend its territory by selling Kyiv essential defensive and attack hardware, such as Bayraktar drones. Erdoğan has publicly affirmed support for Ukraine's territorial integrity, and Ankara has acted as the primary guarantor of maritime security in the Black Sea, enforcing the Montreux Convention and limiting Russian naval transit through the Dardanelles and Bosphorus straits. It also played a key role in hosting peace talks early in the war and brokering a Black Sea grain deal. Türkiye has supported all resolutions at the UN General Assembly related to Ukraine, including to suspend Russia's membership in the UN Human Rights Council. Ankara supported making Russia liable for war reparations, becoming one of the only swing states to do so.²⁸⁴

TRADE. As a founding member of the WTO and signatory of the GATT, Türkiye generally adheres to established trade rules. It has had a customs union with the European Union since 1995 that enabled bilateral trade to reach a record high in 2023 of nearly €206 billion.²⁸⁵ Membership in the European Customs Union has encouraged Türkiye to follow the principles of commercial reciprocity and nondiscrimination.²⁸⁶

FINANCE. Türkiye is an active participant in the global financial order as a member of the IMF, the G20, and the OECD. Facilitated by high economic growth rates between 2006 and 2017, it is an increasingly important donor of official development assistance.²⁸⁷ Separately, Türkiye's investments in Africa have blossomed since 2007, including infrastructure projects worth billions of dollars. That growth has put Türkiye in competition with China for influence through investment in Africa. Though it cannot match China's economic heft, Türkiye has at times outcompeted Beijing for construction contracts.²⁸⁸

Türkiye has, however, faced grievous economic troubles since 2018, including high inflation. In hopes of recovery, Erdoğan is counting on large investment flows from the Gulf, Russia, and the West to jumpstart the economy. That aim reaffirms Ankara's desire to

work with all sides, and to avoid foreclosing economic relationships with countries that themselves have serious geopolitical differences.²⁸⁹ Institutional deregulation in Türkiye has also sparked concerns, including President Erdoğan's decision to appoint himself as the head of the country's sovereign wealth fund, and to make his son-in-law his deputy on the fund's board.²⁹⁰

NONPROLIFERATION. Türkiye has generally supported the nonproliferation order, refraining from pursuing nuclear weapons and embracing the legal nonproliferation regime.²⁹¹ However, Ankara opposes international efforts aimed at limiting access to civilian nuclear technology that could facilitate a country's military ambitions.²⁹² The country's first nuclear power plant, in Akkuyu, includes Turkish nuclear engineers and technicians receiving training in Russia. Erdoğan himself said in 2019 that he "cannot accept" that the West denies Türkiye access to missiles with nuclear warheads.²⁹³ In light of the historic Turkish-Iranian rivalry, it is conceivable that Türkiye might seek its own nuclear arsenal should Iran acquire nuclear weapons, especially if it doubts Washington's continued provision of a nuclear umbrella.²⁹⁴

HUMAN RIGHTS. Human rights in Türkiye and Ankara's willingness to promote human rights abroad have both overall deteriorated over the past decade. Despite condemning China in 2009 for genocide against its Uyghur population, Erdoğan has since walked back his statement and in 2019 claimed that "people of all ethnicities in Xinjiang are leading a happy life amid China's development and prosperity."²⁹⁵ Though Türkiye still hosts more than three million Syrian refugees, surging hostility toward Syrians in Türkiye led authorities to arbitrarily arrest, detain, and deport hundreds of refugees between February and July 2022 in violation of international law.²⁹⁶ In the Turkish-occupied pocket of northern Syria, Kurdish residents—perceived by Ankara as a terrorist threat—bore the brunt of abuses and potential war crimes committed by Turkish forces and local Türkiye-backed armed groups.²⁹⁷

Domestically, Turkish citizens have seen a serious crackdown on their own rights following the 2016 coup attempt. The government implemented broad antiterror legislation in 2018 that has been used to restrict basic rights and freedoms. Arbitrary killings,

torture, and forced disappearances have all become more common.²⁹⁸ In 2021, Türkiye also withdrew from the Council of Europe Convention on Preventing and Combating Violence against Women and Domestic Violence, known as the Istanbul Convention.²⁹⁹ The decision to do so further diminished Türkiye's reputation as a supporter of international human rights. In a significant step back for the country's democracy, Erdoğan jailed his main political rival, Ekrem İmamoğlu, in March 2025.³⁰⁰

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STRATEGIES OF ENGAGEMENT

THE UNITED STATES itself is today reevaluating the international order and searching for a proper place within it. The Trump administration has floated wildly varying approaches, including a spheres-of-influence world in which the United States would focus mostly on dominating (and even acquiring territory in) the Western Hemisphere, while acknowledging Russian—and perhaps Chinese—interests in their own regions. Other times it has insisted that resisting Chinese domination of the Indo-Pacific is its top national security priority, and that it remains committed to European alliances. The administration has used military force against the Houthis in Yemen, citing the need to preserve freedom of navigation, and insisted on a dollar-dominated international financial order, even as it proved ready to upend trading arrangements. While the Biden administration generally expressed support for the international order and sought to punish transgressions against it, its successor pursues a far more conflicted view. In 2025, the notion of America as a global swing state does have merit.

With the right support, the key pillars of international order might endure, in varying degrees of solidity. If they do, they will—or at least can—continue to serve American interests. For all the talk about cutting a major deal with China and resetting postwar relations with Russia, the chances of success in either are vanishingly small. The United States is likely to remain in significant, long-term competition with Moscow and Beijing, a contest that will turn partially on each country's conflicting approaches to the way in which the world is ordered. Once this reality sets in for American policymakers, it should become

clear that global swing states will play a disproportionate role in the ultimate outcome of that order.

Washington should pursue policies toward the six global swing states that: (1) encourage and assist them in bolstering key pillars of global order; (2) deny adversary countries such as Russia and China advantages in areas including military basing, security ties, technology infrastructure, and diplomatic coordination; (3) devote attention to and support for their own needs, on their own terms, in exchange for policies and programs that will further U.S. interests. This section enumerates several overarching policy recommendations, followed by country-specific ones.

Change the diplomatic tone and tenor. A universal complaint among swing state governments is that Washington tends to see countries only through the prism of their relationships with China and Russia. As this report makes clear, U.S. interests in the global swing states stem, in part, precisely from their roles in great power competition. However, that is not Washington's only interest in relations with each swing state, and U.S. diplomats would do well to meet governments on their own terms. None wishes to feel like a pawn in a superpower game, merely threatened or bribed to join one side or the other—even as some play larger countries off against one another to maximize their own maneuver space. The United States should be sensitive to such sentiments, pursuing enduring ties with each country that extend beyond their current positions on China and Russia.

Offer increased market access. The United States boasts by far the world's largest market, with high rates of consumption and goods imports. Access to that market is desired by virtually every country, and, in contrast with other tools of U.S. foreign policy, allowing it costs nothing. The United States should pursue deals that offer access to the U.S. market in exchange for reciprocal trade benefits; export controls on third countries, potentially coupled and harmonized; policies on digital infrastructure; and other economic security measures.³⁰¹ While Washington is currently moving backward, constricting access to its economy via tariffs and other barriers, these steps could form the first steps toward new, mutually beneficial economic agreements with each of the six states.

Increase hard power. A sustainable international order rests on two pillars: a sense of legitimacy among key countries and an overall balance of power.

As this report makes clear, U.S. interests in the global swing states stem, in part, precisely from their roles in great power competition.

The first, as previously discussed, has come under increasing challenge in recent years, and if the United States does not sufficiently invest in hard power, the balance needed to preserve international order could crumble. Washington's defense spending has approached levels reminiscent of the late 1990s—the height of the post-Cold War peace dividend—at just over 3 percent of its gross domestic product.³⁰² Ratcheting up defense spending, as the Trump administration pledges to do, is necessary to manage China and Russia alongside other threats, and to demonstrate staying power to global swing states who might otherwise hedge against U.S. decline by tilting toward American adversaries.

Rebuild soft power. China and Russia pursue influence in each of the global swing states through a variety of soft power activities. Depending on the destination country, Beijing and Moscow provide development and humanitarian aid, build infrastructure, give security assistance, make soft loans, and engage in strategic communications activities. Until recently, the United States did similarly, with many observers calling on Washington to increase the resources devoted to soft power tools and to enhance their effectiveness.³⁰³ In recent months, the United States has instead taken a drastic turn in the other direction by eliminating the United States Agency for International Development, ending 85 percent of its foreign aid programs, ceasing its international broadcasting, dismantling its democracy promotion efforts, and stopping its efforts to promote the free flow of online information. While debates about the effectiveness of any particular program are necessary and appropriate, a wholesale evisceration of America's soft power tools will handicap the United States in its contest for influence.

Engage alongside allies. The sprawling U.S. alliance system, while sometimes today seen as a burden on the American people, nevertheless remains the key enabler of global security. Washington should engage global swing states bilaterally but also at times

with allies and partners. For example, the United States has pursued productive relations with India through the Quad, Türkiye within NATO, and Saudi Arabia in the context of potential normalization with Israel. In engaging with global swing states, Washington is not acting alone, and need not do so. The U.S. Department of State should establish an annual dialogue on engagement with pivotal nations involving the European External Action Service, the foreign ministries of interested European powers, and Japan.

Acknowledge that the United Nations Security Council needs reform and openly express support for its eventual expansion. The United States should continue to state the obvious—that the council’s current structure no longer aligns with today’s global power dynamics. U.S. policymakers should also accept the challenges that come along with achieving meaningful reform and prioritize working closely with influential swing states during their temporary terms on the Council.³⁰⁴

Recommendations for Bilateral Collaboration

Building stronger working relationships with the swing states is a two-way street. All stand to benefit if the United States pursues the specific recommendations outlined here, which are informed by dozens of conversations with experts and officials. By prioritizing initiatives that advantage both the United States and the swing states, Washington will more successfully compete with axis countries to garner the support of and collaboration with those countries pivotal to the future of the international order.

Establish minilateral groupings that include the global swing states. Minilateral frameworks have proliferated in recent years and now include groups as varied as the Quad, AUKUS, I2U2, MIKTA, and the BRICS. With universal bodies including the United Nations largely paralyzed by differences among the veto-wielding powers, minilateral groups—especially those devoted to a single set of issues—offer innovative ways of harmonizing approaches and multiplying efforts among would-be partners. Washington should explore areas in which minilaterals are potentially useful—technology, critical minerals, defense

industrial base cooperation, infrastructure, and maritime domain awareness—and look for opportunities to include global swing states.

Define and address unfair commercial practices by state-owned enterprises.³⁰⁵ Several of the swing states are, as is the United States, seeking to build or revitalize their manufacturing and industrial sectors. The market distortions of Beijing’s state-owned enterprises (SOEs) stifle such efforts. The WTO lacks clear rules regulating the commercial practices of SOEs and has proven incapable of dealing with these distortions. The United States should explore rules that govern SOE behavior and work in combination with key swing states to address Chinese overcapacity. As new U.S. tariffs on China encourage the PRC to dump low-cost goods on markets, including in the global swing states, opportunities may arise to harmonize approaches to Chinese SOEs.

Develop critical minerals partnerships. The United States has awoken to its dependence on China and other chokepoint countries for supplies of critical minerals such as copper, lithium, nickel, cobalt, and rare earth elements. Access to these minerals is necessary for the United States to sustain economic growth and technological innovation. As a result, Washington should prioritize sectoral trade deals in critical minerals with the global swing states: Brazil (notably rare earths), India (copper and cobalt), Indonesia (nickel and copper), Saudi Arabia (gold, phosphate rock, and bauxite), South Africa (manganese), and Türkiye (boron).³⁰⁶ The swing states have also expressed interest in capitalizing on their natural resources by working with the United States to process and market their minerals.³⁰⁷ Washington should encourage Brazil, Indonesia, and South Africa to join the Minerals Security Partnership, a U.S.-led effort to secure and diversify global supply chains for critical minerals (India and Türkiye are already members).³⁰⁸

Empower the U.S. Congress. The House and Senate are relatively untapped resources in engaging with global swing states. Washington should seek opportunities to link parliamentarians, encourage congressional delegations to the six swing countries, support fellowships that embed professionals

from each of them in U.S. congressional offices, and encourage other visits and exchanges. Sub-national contact would be useful as well, including visits and exchanges with governors and mayors of key cities.

Launch a program to immerse American officials in the politics and economics of each global swing state.³⁰⁹ U.S. government expertise on the six swing states remains limited, an omission that will make working closely with them challenging. The Mansfield Fellowship, which provides U.S. federal employees with a year of Japanese language training followed by an assignment with the Japanese government, provides a useful model for elements of such a program. Although some of the six global swing states—and the United States itself—may not be receptive to such a program today, similar initiatives should remain a long-term objective.

Catalyze academic partnerships. Washington should encourage top-tier U.S. research universities to establish partnerships with leading academic institutions in global swing states. Georgetown University’s recently opened campus in Jakarta, for example, might serve as a model for such initiatives.

The following country-specific policy recommendations are hardly exhaustive, but they illustrate the kinds of opportunities now present in Washington’s relations with the global swing states.

Brazil

Increase diplomatic engagement at the highest levels. The United States should demonstrate Brazil’s importance as a partner in the region and beyond by increasing the frequency of diplomatic engagement at the presidential and cabinet levels. Officials and experts have expressed frustration with the United States’ lack of attention to Brazil and the region; here, a little more will go a long way.

Fully implement and expand upon the Agreement on Trade and Economic Cooperation’s Protocol on Trade Rules and Transparency. The protocol was developed under the first Trump administration and should be broadened to include a chapter on digital trade; appendices addressing critical areas such as

medical devices, pharmaceuticals, and supply chain resiliency; and the critical minerals addressed above.³¹⁰

Invest in Brazil’s semiconductor capacity. Brazil hopes to develop the country’s semiconductor testing, assembling, and packaging capacity. It is also trying to become more competitive in semiconductor design—as evidenced by a 2024 law that aims to incentivize domestic semiconductor production.³¹¹ Previous legislation favored importing Chinese semiconductors, while the new law will facilitate Brazilian exports of domestically produced semiconductors. As the United States seeks to diversify its supply of key technologies and offset Chinese influence in pivotal states, it should look to Brazil as a partner for investment in its semiconductor capacity.

Encourage investment in Brazilian infrastructure projects and encourage Brasilia to facilitate U.S. bids and investments. In 2023, Brazil amended its constitution to achieve better tax reliability and navigability. While still complex, these changes to the tax system will be implemented over the next 10 years, potentially leading to a less complicated tax system and more predictability. The United States should encourage that outcome and look for ways to stimulate investment, including through financing terms that become more favorable as the tax environment improves and if corruption declines.

Reduce existing barriers to transfers of military technology to Brazil, increase the frequency of joint naval exercises, and explore a regional maritime initiative.³¹² Brazil’s robust defense industrial base, especially in aerospace, offers opportunities for licensed production of U.S. equipment locally—including Blackhawks or F-16s.³¹³ Brazil already trains and equips some West African fleets and could play a much larger role in combating the growing threat of piracy in the Gulf of Guinea as its naval capabilities expand. Washington should help accelerate Brazil’s maritime emergence by providing training and equipment, as well as by investing in its shipyards. Maritime initiatives should focus on domain awareness and patrol of Brazil’s vast EEZ. The United States and Brazil should sign a reciprocal defense procurement agreement to promote interoperability and smooth the conditions for defense procurement. Over the

longer run, the defense establishments of both countries should evaluate the feasibility of a Brazilian-led, U.S.-backed South Atlantic initiative that would bring together regional navies and coast guards to address drug trafficking; illegal, unreported, and unregulated fishing; human smuggling; piracy; and other forms of maritime-based transnational crime.

Seek opportunities for investment in the energy sector. Brazil requires additional refining capacity for its oil and gas production, and domestic gas fracking could produce fertilizer, which would reduce Brazil's dependence on Russian supplies. The United States and Brazil should explore collaborations in those areas, as well as opportunities to cooperate on uranium mining, rare earths, and lithium for renewable energy projects.³¹⁴ Over the longer run, the two governments could pursue a joint effort to secure a global pact on green energy, building off the newly established Brazil-U.S. Partnership for the Energy Transition.³¹⁵

India

Boost U.S.-India defense industrial cooperation. The defense sector is rapidly growing in India and is a key driver of indigenous defense production.³¹⁶ The United States should explore ways to reduce remaining barriers to bilateral defense trade, increase joint development and production, and increase overall cooperation. Doing so would strengthen bilateral defense ties and help offset India's continued reliance on Russian military equipment.

Expand maritime planning and joint naval exercises.³¹⁷ The U.S. Navy should expand its joint exercises and training programs with the Indian Navy. Washington should also support New Delhi's ambitions to lead maritime affairs in the Indian Ocean. Officials from the U.S. State Department and India's Ministry of External Affairs could together consider how to strengthen coordination between existing Indian Ocean bodies—such as the Indian Ocean Naval Symposium and the Indian Ocean Association for Regional Cooperation.

Pursue sectoral trade agreements. Despite Washington's overtly protectionist inclinations and New

Delhi's own trade barriers, U.S.-India agreements would boost bilateral trade and establish rules in key domains. The two countries should explore trade agreements in sectors including critical minerals, clean energy, and digital trade, thereby avoiding more politically sensitive areas such as agriculture, which would make adoption difficult.

Embolden and invest in the Quad. In a positive move, U.S. Secretary of State Marco Rubio met with foreign ministers of the fellow Quad nations India, Japan, and Australia on his first full day on the job.³¹⁸ U.S. policymakers should continue to prioritize and invest in the Quad to counter Chinese influence in the Indo-Pacific, focusing on maritime security—especially reinvigorating the Quad Indo-Pacific Partnership for Maritime Domain Awareness—alongside humanitarian assistance and cooperation on emerging technologies.

More deeply align technology standards. The Trump administration's Transforming the Relationship Utilizing Strategic Technology initiative, announced during Modi's February 2025 White House visit, provides a senior-level platform for deepening bilateral technology cooperation.³¹⁹ The TRUST initiative builds on the Biden administration's iCET, launched in January 2023 by then-U.S. national security advisor Jake Sullivan and his Indian counterpart, Ajit Doval. TRUST should increasingly focus on expert-level workstreams, including efforts to align technological standards between the two countries.

Indonesia

Diversify undersea cables. The contest over the South China Sea risks disrupting the international cable system on which Asia relies for internet connectivity.³²⁰ The United States has begun working with Indonesia on this vulnerability and should continue to do so, including through the provision of development financing.³²¹

Encourage semiconductor packaging. Indonesian officials hope their country can emerge as a competitive player in the global semiconductor industry.³²² As the United States looks to diversify its supply chains in key technologies, including microelectronics, it

should seek to facilitate Indonesia's capacity to test and package semiconductors. Regulatory risks still pose a challenge for investors in Indonesia's industry, but among the steps the country has taken to raise foreign investment and make it easier, in 2020 it passed an omnibus law on job creation.³²³

Boost U.S.-Indonesia trade and investment ties.

The 2020 omnibus law aimed to change the economic environment and make investing in Indonesia easier. Indonesia requires significant foreign direct investment over the next several years to achieve its (lofty) 8 percent growth target.³²⁴ Washington could pursue a sectoral agreement in digital trade, invest more in green energy, and spend more on infrastructure investments through vehicles such as the Development Finance Corporation.

Expand joint maritime exercises, including in the South China Sea.

Indonesia and the United States have stepped up their joint military exercises and initiatives in recent years, including via efforts such as Super Garuda Shield, Rim of the Pacific, and the Pacific Partnership.³²⁵ The two countries should expand these efforts, add additional partner countries to them, and look for other opportunities to increase interoperability and build operational capacity.

Support democracy and human rights. Indonesia has assumed a prominent position in promoting democracy, including through the Bali Democracy Forum and similar efforts. The United States and Indonesia should forge a minilateral grouping, together with other democracies, that support democratic forces in the Indo-Pacific with funding, diplomacy, and coordination.

Invest in people-to-people ties and education.

The United States should pursue a strong foundation for long-term cooperation by expanding Fulbright scholarships to Indonesia, encouraging American universities to establish a presence in Jakarta, and sponsoring visiting fellowships for Indonesians in the United States. In the near term, given the reductions in such programs, the ones focused on Indonesia should be protected from cuts.

Saudi Arabia

Establish a broader security framework and encourage regional normalization.

Before Hamas's 2024 attacks derailed progress toward Saudi-Israel normalization, the framework for a regional diplomatic deal and a robust U.S.-Saudi security agreement were nearly in place. Washington should take up the effort again, with some changes. The aims should be Saudi-Israeli normalization, a light water nuclear reactor in exchange for bolstered Saudi nonproliferation commitments, a Saudi commitment to prevent China from establishing military installations in the Kingdom, and a strengthened bilateral security relationship (including, for example, expedited weapons sales) that remains short of a mutual defense agreement.

Establish a bilateral technology framework.

The two countries should create a regular forum to discuss emerging technologies and their development, including data centers, semiconductor controls, and the proliferation of new artificial intelligence models. Washington should facilitate technology transfers between the United States and Saudi Arabia and explore a fund to provide third countries with alternatives to Chinese technology, especially in data centers and 6G telecom.

Boost bilateral trade agreements, investment incentives, and industrial partnerships.

Despite growing economic ties between Saudi Arabia and China, the United States remains Riyadh's preferred partner in high-tech industries, defense, and financial markets. However, legal restrictions, along with trade and regulatory barriers, risk creating a vacuum that China is well positioned to fill. Washington should conduct an audit of the barriers to bilateral economic relations and seek to eliminate them through agreements and policy changes.

Expand U.S.-Saudi green technology trade partnerships.

This will ensure that Riyadh sources advanced energy solutions from American firms rather than competitors. Saudi Arabia is actively investing in hydrogen, solar, and carbon capture technologies as part of its Vision 2030 energy diversification strategy. Developing joint ventures in

hydrogen production, battery storage, and sustainable infrastructure could advance mutual economic interests. Washington should also seek to take advantage of Saudi Arabia's \$2.5 trillion in untapped mineral wealth, which includes lithium, copper, and rare earth elements.

Reinforce U.S. capital market accessibility and financial cooperation. In doing this, the United States can sustain Saudi confidence in dollar-based investments and ensure that alternative financial systems remain secondary rather than primary options. The Public Investment Fund remains heavily invested in U.S. equities and Treasury securities, signaling continued Saudi reliance on Western financial stability. The Kingdom can play an important role in reinforcing the existing financial order, and the United States should work with it to do so, including by maintaining the stability of its own markets through a rational and predictable trade policy.

Speak up on behalf of human rights. The Khashoggi killing dealt a nearly mortal blow to U.S.-Saudi relations, and the imprisonment of American citizens in the Kingdom for political crimes has diverted an otherwise productive bilateral agenda. Washington should not imagine that Saudi Arabia will become a liberal democracy anytime soon, but nor should it remain silent in the face of domestic human rights abuses. Saudis and others should see Washington stand up for universal values, and Saudi officials should understand that relations with the United States will never reach their true potential while abuses continue.

South Africa

Replace the AGOA with a bilateral trade agreement. South Africa has benefited from access to the U.S. market provided by the African Growth and Opportunity Act. The arrangement is, however, one-sided, with the AGOA's endurance contingent on Washington's willingness to renew the benefit. The two countries should move toward a reciprocal, sustainable trade footing by pursuing a bilateral trade deal in which both sides lower barriers and make binding commitments.

Pursue critical mineral cooperation. South Africa is home to one of only three high-quality manganese processing plants in the world (the other two are PRC-owned) and is the source of other critical minerals. If and when the broader political relationship improves, Washington should explore incorporating South Africa into Inflation Reduction Act incentives that could boost production for U.S. consumption.

Expand educational and people-to-people exchanges. Russia and China have extensive soft power efforts in South Africa, including sponsoring exchanges and study centers, strategic communications efforts, and attempts at elite capture. Washington should expand its own efforts, including by bringing rising political and business leaders to the United States.

Include South Africa in the Lobito Corridor. The Lobito Corridor is a G7-led infrastructure project that connects the port of Lobito in Angola to the Democratic Republic of Congo and Zambia. It aims to boost trade and economic development in the region by facilitating access to critical minerals and other goods. South Africa would benefit from investment in its infrastructure through the project, which would also facilitate the flow of critical minerals from South Africa into U.S. markets.

Sustain cooperation in health. Through the President's Emergency Plan for AIDS Relief (PEPFAR), the United States has invested more than \$110 billion to save some 26 million lives, including in South Africa.³²⁶ The future of PEPFAR is currently in doubt as the Trump administration eliminates a wide swath of foreign aid programs. Its elimination or diminishment would amount to a historic mistake; instead, the United States should continue to deliver lifesaving treatment to millions of South Africans.

Implement Global Magnitsky Act sanctions against corrupt individuals. Corruption is endemic in South Africa, and some illicit activity has been linked to sanctioned Russian oligarchs and even terrorist financing.³²⁷ Washington should impose Global Magnitsky Act sanctions on officials involved in corruption and human rights abuses.

Revitalize the U.S.–South Africa Bilateral

Commission. The commission was a set of biannual high-level conversations to privately review and discuss the strategic relationship. Instead of litigating serious disagreements through the media, making use of this commission to address challenges to bilateral cooperation might help to salvage an important relationship that is currently in tatters.

Türkiye
Work together to stabilize post-Assad Syria.

The fall of Bashar al-Assad’s regime in Syria offers an opportunity for the United States and Türkiye—previously divided over support to Kurdish forces there—to work toward common ends. The two should encourage the integration of the SDF into Syrian national armed forces, organize donor nations in support of reconstruction, and push the new regime in Damascus to govern in a tolerant and inclusive fashion.

Cooperate on nuclear power. Türkiye is building, with Russian support, a major nuclear power plant and intends to expand its efforts to generate zero-carbon power. The United States should encourage U.S. firms, or potentially a Western-led consortium, to bid for upcoming tenders.

Expand the defense industrial relationship. The United States and Europe remain woefully behind in defense production capacity, and Türkiye brings skill and scale to bear. The opportunities are not restricted to U.S. investment in Turkish industry; a Turkish company has, for instance, bought a facility in Texas to manufacture 155mm artillery shells in large quantities. Washington and Ankara should encourage increased bilateral defense deals that boost production in both countries. Washington’s interest in acquiring drones—for both its own arsenal and those of allied countries—provides an obvious early opportunity, given Turkish drone expertise.

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CONCLUSION

THE CURRENT INTERNATIONAL ORDER, and America's disposition toward it, are in tumult. While revisionist powers attempt to remake the world to suit their authoritarian preferences and desire for spheres of influence, Washington's traditional support of existing principles, rules, and institutions is very much up for grabs. The result is that sharp competition endures between the United States on the one hand and China and Russia on the other, even as U.S. policymakers remain unsettled on the very purpose of these competitions. Beijing and Moscow seem clearer on their own objectives—their contests with the United States turn significantly on the way in which the world is ordered.

American policymakers would disengage from efforts to preserve an ordered world at their peril. The key pillars of international order have generated concrete benefits for Americans and can continue to do so. Yet the effort to preserve global order cannot imply maximal U.S. exertion in every region and equivalent ties with every country. Washington must prioritize its efforts and resources on relationships and issues where the potential payoff is high and the opportunity cost of disengagement is plain. The global swing states, which will play a disproportionate

role in the contest for international order, represent a natural area of focus for U.S. foreign policy.

Brazil, India, Indonesia, Saudi Arabia, South Africa, and Türkiye are vastly different countries in many respects. Yet each is multi-aligned, with dominant regional roles and global ambitions. All seek changes in international rules and institutions, and each is courted, to greater and lesser degrees, by great powers hoping to boost their own influence. The United States should prioritize the global swing states in its foreign policy, working with them to bolster the core principles of international order and to deny advantages to America's great power rivals.

That requires treating each of the six as more than a pawn in great power competition. They are significant powers in their own right, with their own interests and agency. The United States should engage with the global swing states in ways that benefit both sides. Its aim should be to make progress toward what must be Washington's ultimate goal: preserving the key pillars of international order, even as specific rules and institutions adapt. That is a generational task, and one worthy of the United States and its allies and partners.

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