

Report



Pivotal Powers 2024

**Innovative Engagement Strategies
for Global Governance, Security, and
Artificial Intelligence**

*Alexandra de Hoop Scheffer, Sharinee L. Jagtiani,
Kristina Kausch, Garima Mohan, Martin Quencez, Rachel
Tausendfreund, Gesine Weber*



Table of Contents

Foreword

Alexandra de Hoop Scheffer 04

Introduction

Martin Quencez and Rachel Tausendfreund 05

Multilateral Reform and Minilateral Cooperation

Garima Mohan and Rachel Tausendfreund 11

Pivotal Powers and International Security: Toward Flexibility

Gesine Weber 19

The Dawn of Pivotal Powers in Artificial Intelligence

Sharinee L. Jagtiani and Kristina Kausch..... 27

Policy Recommendations

Martin Quencez and Rachel Tausendfreund..... 35

Foreword

By Alexandra de Hoop Scheffer

Recent years have witnessed a significant shift in the global order toward multipolarity. UN General Assembly votes on Ukraine and Gaza, in particular, served as a wake-up call for the United States and its European allies. These votes demonstrated that transatlantic priorities and policies no longer reflect a worldwide consensus and that the era of a global majority's acceptance of Western approaches to international challenges has ended. The limited US and European anticipation of such divergence, however, underscores the importance for the transatlantic partners of expanding their understanding of the positions of countries beyond the confines of their alliance.

In the context of an increasingly contested post-World War II global order and its US leadership, new central players have emerged in key areas of international politics. This shift is particularly evident in mediation efforts involving countries such as Brazil and Qatar, which have undertaken their own initiatives in the Russia-Ukraine conflict. In addition, India's engagement in minilateral formats is shaping cooperation in the Indo-Pacific region, and Türkiye's bid to join the BRICS demonstrates that NATO membership does not preclude alternative alignments.

The increasingly important geopolitical role of these middle powers is undeniable. Unlike the United States and China, but like many European countries, these powers are not "great powers" in terms of military expenditure or economic performance. However, they possess critical assets that they increasingly leverage to influence global affairs. These "pivotal powers" are likely to be at the forefront of shaping the future world order.

This publication, "**Pivotal Powers: Innovative Engagement Strategies For Global Governance, Security, and Artificial Intelligence**", serves as a crucial foundation for more effective cooperation with these powers in the evolving global landscape. This report builds on GMF's earlier work on "global swing states", a concept coined by GMF in a [2012 publication](#) and revisited in the 2023 study "[Alliances in a Shifting Global Order](#)". Written by experts on GMF's geostrategy and innovation teams based in the organization's offices on both sides of the Atlantic, this report is a prime example of pooling topical and geographic expertise. The collaborative and cross-cutting approaches presented here, combined with in-depth qualitative research over several months, allow GMF to spearhead the intellectual and policy debate on innovating transatlantic relations in a changing geopolitical environment.

The research concentrates on three critical arenas of international relations: multilateral organizations, security, and artificial intelligence. It presents the perspectives and priorities of pivotal powers—namely Brazil, India, Indonesia, Nigeria, Saudi Arabia, South Africa, and Türkiye—regarding these challenges, and their assessments of US and European approaches to address them.

The focus of this publication is about listening to and learning from pivotal powers. The United States and Europe must extend the scope of their relationships to others if they are to address the growing number of international challenges. They must engage pivotal powers as equal partners in tackling global issues and adapt policies to take into account pivotal powers' insights.

By fostering more effective engagement with diverse global perspectives, this report aims to prompt a reassessment of US and European approaches to international leadership. This recalibration is crucial for maintaining influence and relevance in the evolving multipolar world order.

Introduction

By Rachel Tausendfreund and Martin Quencez

It is time to embrace revision. This is no longer the world of 1945, nor of 1995, when the World Trade Organization was founded (see graphic below). It should, therefore, be obvious that the rules devised then are (over)due for review. Revisionism, however, has two versions, one of which involves a falsified retelling of history. But the other challenges the multilateral status quo, and it is that which should be pursued. This may discomfit the permanent members of the UN Security Council, but the international system must adapt to new circumstances or collapse. In fact, with multipolarity a reality, fragmentation or adaptation is already well underway.

Percentage of Global GDP, Pivotal Powers

	US	EU and UK	Brazil, India, Indonesia, Nigeria, South Africa, and Türkiye	China
1945	50	28	4	5
1995	25	31	8	6
2022	24	17	16	18-19

Source: World Bank

Europe and the United States, rather than resisting the change, must join with partners to constructively revise global systems and practices. The US approach to China's rise often seems based on a bipolar vision while Europeans and many other middle powers are more willing to embrace a multipolar future. As Dino Patti Djalal, former Indonesian vice foreign minister, argued at this year's World Economic Forum annual meeting, "21st century global order will be shaped not by major powers, but by proliferation of middle powers."

This report is the third iteration of a project focusing on these middle powers. The project was launched in 2012 with the publication of "[Global Swing States](#)", in which authors Daniel M. Kliman and Richard Fontaine argued that:

"To defend and strengthen the international order that has served so many for so long, American leaders should pursue closer partnerships with four key nations – Brazil, India, Indonesia and Turkey. Together, these 'global swing states' hold the potential to renew the international order on which they, the United States, and most other countries depend."

In the 2023 update, "[Alliances in a Shifting Global Order](#)", we added two countries, Saudi Arabia and South Africa, to the group of "states [that] promise the greatest return on investment". Now, we offer a further iteration, focusing on those countries among this generally influential group of middle powers of the "Global South" that we deem "pivotal" in specific policy areas.¹

A central conclusion of the 2023 report was that while all six influential middle powers examined are happy to cooperate with Europe and the United States on many issues, binary (“us-versus-them”) approaches to the great powers are roundly rejected in favor of compartmentalization and hedging. This followed a year of equivocal responses among “Global South” countries to Russia’s invasion of Ukraine, a development that shocked many in the EU and the United States. But this shock revealed a blinkered vision. South Africa’s and India’s abstentions from the March 2022 UN General Assembly resolution deploring the invasion and calling for a withdrawal of Russian forces reflected a history of choosing nonalignment in conflicts involving great powers. Additionally, many middle powers had (and still have) economic and strategic ties to Moscow—Brazil, for example, relies on Russian fertilizer supplies—and naturally prioritized their domestic challenges over international conflicts. Germany did no less when it insisted on moving forward with the Nord Stream II pipeline despite Russia’s 2014 invasion and annexation of the Crimean peninsula and despite the objections of EU partners and the United States. US President Joe Biden did no less when he met with Saudi Crown Prince Mohamed bin Salman in July 2022 to ask for assistance with lowering global oil prices, despite the president’s labeling Saudi Arabia a “pariah” state after the 2018 murder of journalist Jamal Khashoggi.

The disconnect perceived in many Western capitals did not actually stem from differences in perspectives on Russia’s war in Ukraine. The invasion was widely condemned, if often in thinly veiled terms of maintaining “territorial integrity”. The gap between the West and the “Global South” resulted instead from Europe’s overestimating the centrality of “its” war for the rest of the world and, in Washington’s case, from overestimating the United States’ ability to persuade middle powers to align with coercive measures to isolate Russia.

Hamas’ attack on Israel on October 7, 2023, and the resulting war in Gaza have magnified the gap. The West and the “Global South” view the Israeli-Palestinian conflict through fundamentally different lenses. For most in the “Global South” and much of the Asian “Global North”, the decades-long conflict is a result of colonialism, national liberation, and anti-imperialism. This has led to stronger support for the Palestinian cause and criticism of Israel. In contrast, Western capitals supported the creation of Israel and see the country in the context of centuries of persecution endured by Jews that culminated in the Holocaust, and in the context of the fight against Islamist terrorism. Europe and the United States emphasize the need for Israel’s security, counterterrorism, and regional Middle East stability, which manifests itself in support for Israeli military actions, albeit with some calls for restraint and varying degrees of domestic controversy.

This fundamental divergence of views shapes reactions to the war in Gaza (public schisms within many Western countries notwithstanding). In a speech before the UN General Assembly, Turkish President Recep Tayyip Erdoğan expressed powerful criticism of international support for Israel: “Along with children in Gaza, the United Nations system is also dying, the truth is dying, the values that the West claims to defend are dying, the hopes of humanity to live in a fairer world are dying one by one.”

The wars in Ukraine and Gaza have undeniably reflected Security Council dysfunction, as Russia has vetoed all draft resolutions regarding its invasion of Ukraine. In addition, four ceasefire draft resolutions for Gaza have been vetoed, three by the United States and one by China and Russia. Many see a broken system, but no will or consensus to reform it has materialized. An optimistic person may say that both, however, are building, as evidenced by

the adoption of the Pact for the Future, a declaration to reimagine the multilateral system. It includes language calling for a more “representative, inclusive, transparent, efficient, effective, democratic and accountable” Security Council. The United States, the United Kingdom, and France have underscored their commitment to this, and the Biden administration has supported important progress toward reforms including text-based negotiations. This momentum may have, however, been short-lived. The incoming Trump administration is unlikely to invest significant effort in multilateral reform.

Multilateral reform is high on the agenda of all pivotal powers, but other global governance and cooperation alternatives have already arisen in the form of a web of important minilateral groupings, from the BRICS and the G20 to the Quad and the Just Energy Transition Partnership. Whatever the form of cooperation, Europe and the United States should focus on making progress with these institutions, and with middle powers directly, on issues on which collaboration is desired, despite disagreements in other areas.

What issues and what topics offer the best results from, or return on, an engagement effort? This is the question we attempt to answer by focusing on middle powers that are particularly important or influential—or pivotal—in the policy areas of global governance, security, and technology.

To manage an otherwise unwieldy undertaking, we focus in the following chapters on two to four pivotal powers of the “Global South” for each policy area (see graphic below), acknowledging that in these areas other middle powers may also be pivotal. On the topic of global governance, or multilateral and minilateral cooperation, we examine Brazil, India, Indonesia, and South Africa as highly engaged, diplomatic heavyweights. For international security, we concentrate on the priorities and preferences of Brazil, India, Nigeria, and Türkiye. As regional leaders, these four states are pivotal players in addressing nearby security challenges that have global consequences. And for technology, we highlight India and Saudi Arabia, examining their comparative advantages on the artificial intelligence (AI) value chain, and the opportunities and risks arising from this.

Pivotal Middle Powers

	Brazil	India	Indonesia	Nigeria	Saudi Arabia	South Africa	Türkiye
Diplomacy/ Multilateral/ Minilateral Order	X	X	X			X	
Security	X	X		X			X
AI		X			X		

We have adapted our methodology for this study by adopting a journalistic process that uses interviews with researchers and policymakers from the selected countries, and research from local experts, to get an inside view of government priorities. The report aims to provide a detailed understanding of these countries' perceptions of challenges related to the multilateral system, global security, and AI, and to explain the narratives that they promote in these areas. Gaining a better comprehension of their arguments—as disputable as they may be from an analytical perspective—is paramount for designing better policies toward pivotal powers. The study, therefore, does not recommend aligning unquestionably with the priorities of these states, but it concludes that any serious strategy of engagement must take the concerns of pivotal powers seriously.

For all the pivotal powers examined, it is also clear that Europe and the United States should improve their understanding of the interests of these potential partners before approaching them. That will require listening to them.

Further conclusions are:

The “Call to Action on Global Governance Reform” adopted by the G20 in a meeting at the UN provides a solid blueprint for reforms there, at the World Trade Organization, and for International Monetary Fund loan quotas that must be implemented. But blockages at these multilateral institutions, likely to continue under a Trump administration, mean North-South and South-South cooperation in flexible minilateral formats will be the focus of much diplomatic activity and progress. Europe and the United States will have opportunities to achieve goals in minilateral formats, but they may need to improve their understanding of and more easily accept local realities.

To enhance cooperation with pivotal powers on international security, a shift in the European and American mindset is critical. Both need to seriously consider the priorities of the pivotal powers, such as the fight against terrorism or the management of regional conflicts. This implies no public lecturing from the transatlantic partnership on democratic standards or pressuring pivotal powers to choose sides in conflicts that are not of primary concern for them. Following Trump's reelection, Europe will also have to react to a more transactional US approach to the pivotal powers, which could undermine transatlantic coordination on human rights and democratic values.

To seize the momentum for AI cooperation with pivotal powers, we recommend leveraging the opportunities offered through India and Saudi Arabia on this technology to diversify transatlantic value chains and reduce dependency on China. Despite security concerns, facilitating technology transfers with pivotal powers may also be necessary to mitigate the risk of losing the “New Tech South” to China or Russia.



Multilateral Reform and Minilateral Cooperation

By Garima Mohan and Rachel Tausendfreund

The end of the Cold War was the golden age of multilateralism. The cessation of great-power rivalry and the emergence of unipolarity created conditions conducive for greater regional integration in Europe and Asia. But the unipolar moment is over. China's rise, its turn as an assertive and aggressive actor in the Indo-Pacific, and its coordination with Russia to influence existing multilateral institutions while creating new ones—at regional and global levels—have generated unprecedented challenges.

Generalized conflict between China and Russia, on one hand, and the United States, on the other, has largely disabled the UN Security Council. Permanent-member veto power has left the body unable to affect Russia's war in Ukraine or the war in Gaza, despite numerous General Assembly resolutions.

As a result of these and other new challenges, the inability of existing institutions to solve them, and a perceived imbalance in the international system, middle powers are proliferating their own regional organizations and more flexible arrangements in the form of minilaterals. As Dino Patti Djalal, former Indonesian vice foreign minister writes, "while Western nations are beginning to de-risk from China and Russia, and as the space for dialogue between them shrinks, middle powers of the Global South are forming unprecedented economic, diplomatic and strategic links with one another."²

This chapter examines Brazil, India, Indonesia, and South Africa as pivotal powers on issues of governance. All are influential regional powers and leading diplomatic players. Brazil, India, and South Africa are original BRICS members and centrally engaged in questions of multilateral reform. Indonesia is a growing power³ and a leader in the Association of Southeast Asian Nations (ASEAN). All four are agenda shapers in the G20, with Indonesia, India, and Brazil, sequentially hosting the 2022-2024 summits, and South Africa to host in 2025 (the African Union was given permanent membership during the New Delhi summit). Clearly, there are other countries that could have made the cut, especially Türkiye, which, according to the Lowy Institute's Global Diplomacy Index, now has the world's third-largest diplomatic presence.⁴ But given China's centrality in the evolving international system, Indonesia was included instead.

Brazil

Brazil has a long history of diplomatic engagement and is a prominent voice for reform of the UN and Bretton Woods institutions, and for a more equitable global system in general. As a sign of its influence, Brazil set reforming global governance institutions as one of the three priorities of its G20 presidency in 2024. As President Luiz Inácio Lula da Silva said at the September opening session of the meeting of G20 foreign ministers in New York, it is Brazil's "core belief that [the] United Nations are and must continue to be the heart of the multilateral system."⁵

At the same time, Brazil is an engaged BRICS member and active in many other minilaterals, both global (e.g., the Community of Portuguese Language Countries; South Atlantic Peace and Cooperation Zone; and the India, Brazil, South Africa Dialogue Forum) and regional (e.g., the Southern Common Market (MERCOSUR); the Community of Latin American and Caribbean States; and the Union of South American Nations). From a Brazilian perspective, minilaterals serve a triple purpose. First, they push forward agendas that are blocked in multilateral institutions so that they may then kickstart action. As one Brazilian analyst put it, “reforming global governance is the glue that put BRICS together.” The G20 “Call to Action” on UN reform is an example of this. Second, minilaterals provide a challenge to or compensation for the inequities of existing multilateral arrangements and provide regime-shopping opportunities. The BRICS financing mechanism, the Contingent Reserve Arrangement and New Development Bank, for example, is meant to compensate for the reform gridlock at the International Monetary Fund and the World Bank. Third, minilaterals provide avenues for enhanced regional or South-South cooperation, in and of itself a Brazilian priority.

In general, with the partial exception of the Jair Bolsonaro years, Brazil has been committed to promoting sustainable development, addressing global inequities, and supporting human rights and social justice on the global stage. Global cooperation on climate change is a priority, but one that must be paired with “the right to development”. Brazil also has a strong tradition of nonintervention and promoting conflict resolution. Brasilia’s unwillingness to support sanctions against Russia or contribute militarily to supporting Ukraine is consistent with its policies to adopt only sanctions authorized by the UN Security Council and to refrain from selling weapons to countries engaged in conflict.

India

India has a two-fold approach to the global order. The country aims to reform existing global governance institutions to make them more representative through greater engagement. As Professor Harsh V. Pant argues, “from being a persistent naysayer to a nation willing to share responsibility for global governance has been one of the most striking trends in Indian foreign policy”.⁶ While demanding UN Security Council reform, India has also underlined its role as a global stakeholder on issues such as climate change, sustainable development, health, and pandemic response, “demonstrating its commitment to collaborative and inclusive global governance”.⁷

New Delhi believes, however, that global governance reform is a slow process while current Indo-Pacific challenges demand fast solutions. Many in the Indian capital believe that “post-Cold War multilateralism is past its peak”⁸ and that the old multilateral order is in crisis. New Delhi’s priority is to shape, with other middle powers, regional and global orders through newer institutions and minilaterals.

India is deeply invested in the Quad, which brings it together with Australia, Japan, and the United States; trilaterals, such as those with France and Australia, and with Australia and Japan; and the I2U2 (India, Israel, United Arab Emirates (UAE), United States) format, which is gaining traction in the Middle East. India believes that these flexible arrangements allow for greater impact and collaboration among partners than in established formal institutions.

While aligning with other middle powers, yet aware of China's increasing influence in them, India is also keen to play the role of a leading "Global South" power. India's G20 presidency focused on including "Global South" voices and on advocating for a "balanced" globalization that would help all countries. India positioned itself as a bridge between developed and developing countries and used the platform to highlight issues faced by the latter, particularly the economic impact of the pandemic and the global repercussions of the Ukraine war.

Rising tensions with China have led to many significant shifts in Indian foreign policy. This is evident in New Delhi's view of its membership in the BRICS and Shanghai Cooperation Organization. India initially joined these groups to find a voice in a unipolar world by working with other "rising powers". Today, New Delhi's roles in these formats is substantially different as India's biggest challenge is now Beijing's push for a unipolar Asia. The United States has also emerged as one of India's closest partners given the two countries' broad alignment on China and the utility of flexible formats, particularly the Quad. India and Europe are also moving closer, but the latter's impetus to export its own model of integration and institutions prevent it from fully understanding and participating in regional and minilateral arrangements.

Indonesia

The focal point of Indonesia's foreign policy has always been the UN and the multilateral system, which Jakarta still considers the "key avenue" for international relations. At the same time, the country has promoted South-South cooperation since the Asia-Africa Bandung Conference of 1955. Indonesia increasingly focuses today on regional diplomacy and cooperation, primarily through ASEAN. The new Indonesian president, Prabowo Subianto, said in his October inauguration address that his country chooses a "free and active, nonaligned" approach to international relations, but one "based on the principle of anticolonialism". Unlike the other pivotal powers examined here, Indonesia is not a BRICS member (though some sources say that it is contemplating membership) and is not a prominent challenger of Western-dominated multilateral systems, though it "has never stopped striving for reform of the UN, especially the UN Security Council".⁹

Jakarta's priority minilaterals are, for global issues, the G20 and, for regional issues, ASEAN, but it is involved in others, including the Indonesia-Africa Forum (IAF) and the Forum for East Asia-Latin America Cooperation. Beyond minilaterals, Jakarta is increasingly looking at middle power cooperation as a foreign policy pillar. Australia and Japan are key partners, and relations with India are improving, though slowly. Cooperation with the United Arab Emirates has improved significantly. The Emirates (alongside the United States, Japan, and China) have put money into the Indonesia Investment Authority, a sovereign wealth fund meant to attract foreign co-investors and finance economic development. Masdar, the Emirati renewable energy firm, has partnered with Indonesia's state-owned electric utility PLN to launch Cirata, the largest floating solar farm in Southeast Asia.

Sustainable development, climate change, and peaceful conflict resolution are Indonesia's priority issues. Reform of the multilateral system, especially that of the UN and World Trade Organization, are also top priorities, and they remain forums preferable to minilateral alternatives as the country sees no substitute for a global rules-based order.

However, Jakarta sees great potential for regional middle powers to collaborate on resolving conflicts and building trust and cooperation along the ASEAN model.

South Africa

South Africa also envisions a multipolar world order and, like the aforementioned countries, seeks to reform multilateral institutions through engagement. On economic justice, climate change, a just energy transition, and human rights, South Africa is a vocal advocate in these institutions. Its regional leadership may be contested,¹⁰ but global diplomacy comes naturally to South Africa.

The country's foreign policy is rooted in the idea of "progressive internationalism", which has been defined as "the shared opposition to imperialism perpetuated through imbalances between countries of the global North and South".¹¹ This lends itself to Pan-Africanism, supporting the rights of post-colonial countries, and speaking for subjugated powers, as South Africa has done during the current Middle East crisis with its case against Israel before the International Court of Justice.¹² The country will also highlight its solidarity with the "Global South" as a key theme of its upcoming G20 presidency, which is to focus on fairness and "just" globalization.

Yet, there is a tension in South African foreign policy given the country's close ties with Russia and China. Even though South Africa views its relationship with the two countries as part of its policy of solidarity and engagement with post-colonial nations, this framing no longer applies given China's political and economic rise and Russia's violating the sovereignty of its neighbors.

And yet, for today's South African leadership, "Beijing provides a more compelling view of the world"¹³ while the Biden administration's democracies-versus-autocracies framing does not. South Africa did not condemn Russia's war against Ukraine, and official African National Congress policy describes it as a conflict between "US-led NATO" and Russia.¹⁴ Pretoria strongly supported the China-led expansion of BRICS, which India and Brazil opposed.

South Africa's closest economic partners remain the United States and Europe, and it chose to use Western-made vaccines during the pandemic, but its strategic ties with Russia and China are growing.

Recommendations for the Transatlantic Partnership

Given strategic competition with China, Beijing's push for its own world view, and its expanding political and economic influence in the "Global South", the United States and the EU should support reform of the multilateral system. If the Trump administration abandons this position, collective and firm EU support for it should persist.

The pivotal powers covered here do not share a common world view or even foreign policy priorities. They pursue different versions of nonalignment. South Africa has become more closely aligned with Beijing and Moscow, while India has diversified its ties and forged close partnerships with the West amid clear strategic competition with China. On Ukraine, too, pivotal powers' differences are visible. Brazil supported UN votes condemning Russia's invasion, a conflict that South Africa views as one between NATO and Moscow. India's position on the fighting reflects an effort to balance relations with Russia on the one hand and Europe and the United States on the other.

Pivotal powers, however, agree that their relationships to the United States and China, and the competition between those two countries, are increasingly shaping foreign policy choices. But pivotal powers resist demands for binary alliances. They are also united in trying to assert their own influence to shape the global order.

With this in mind, the United States and Europe should:

- **push for multilateral reform and agenda coordination:** While differently engaged on these issues, the four pivotal powers support the G20 Call to Action for UN reform, including its commitment to increasing Security Council representation. Ideally, the West should put its collective weight behind suggestions for reform (e.g., from the G4 and Uniting for Consensus). Individual EU states could also partner with one or more pivotal powers to shape their own proposal. Liechtenstein's success with its "veto initiative" shows that (at least some) movement is possible.

In addition, the EU and its member states should signal their commitment to UN peacekeeping, which remains crucial, by increasing funding for it and pressuring pivotal powers seeking a larger global role to do the same.

- **join multilateral and minilateral agenda cooperation efforts:** While structural reforms are stalled, improving inclusive agenda-setting can advance. Indonesia, India, and Brazil have improved cooperation on agenda-setting at recent G20 summits, ensuring that (some) previous priorities are promoted by subsequent presidencies. The United States and Europe should continue the tradition when they assume leadership roles. Under Trump, however, the United States is likely to withdraw from multilaterals and emphasize minilaterals. His first administration, after all, focused on reviving the Quad. Europe should continue to focus on multilateral reform and use this as an opportunity to strengthen its ties with pivotal powers.

The United States and some EU member states work constructively in formats such as the Quad and Indo-Pacific trilaterals. The EU should consider project-based cooperation that uses these formats. The bloc's

maritime domain awareness initiatives, for example, could be linked to similar projects run by the Quad in the Indian Ocean. The same holds true for connectivity projects under the Global Gateway initiative.

- **provide credible alternatives to China:** Through its Belt and Road Initiative (BRI), China provides funding for critical sectors in many pivotal powers. Japan is among other actors, however, that are important partners in developing infrastructure in Southeast Asia and Africa. But each acts in different ways, as the UAE-Indonesian partnership on the Cirata solar energy farm and the US-Japanese-European Just Energy Transition Partnership (JETP) demonstrate. While the Emirates successfully partnered with PLN, most powerful player in Indonesia's electricity sector, the JETP excluded the company in an effort to push regulatory reform.¹⁵ The JETP partners need to decide whether a green transition or a market transition is the more important goal.
- **offer tender support:** Projects, such as those the JETP finances, need to be accompanied by implementation-capacity support, especially for the tender process. Stakeholders, including lawyers, bankers, and engineers, should have input into the process. Developing countries would also benefit from assistance with identifying, planning, and executing projects that align with investors' interests. Smaller EU countries could focus on such targeted niche support.
- **understand that EU priorities are not global priorities:** The EU's consistent leadership on climate matters is welcome, but unilateral EU measures such as the EU Deforestation Regulation and the Carbon Border Adjustment Mechanism are seen as discriminatory and protectionist. Those who carry the greatest historical responsibility for climate change should bear the heaviest burdens for correcting it. In addition, processes for formulating and adopting relevant policies should include consultation with pivotal powers. Short of that, assistance in meeting standards should accompany discriminatory climate-related measures. This includes technology transfer and green investment support.
- **use trade policy instruments strategically:** EU trade policy is an opportunity; all welcome more investment and trade. However, the bloc's process for free trade agreements (FTAs) is bureaucratic. It is not nimble enough to handle today's most pressing challenges, including supply chain security and a search for new targets of investment and manufacturing to reduce dependencies on China. The incoming EU Commission's decision to broaden its trade commissioner's remit to include economic security is welcome. It will provide Brussels with more instruments to work with countries such as India, with which FTA negotiations are slow and complex. Elsewhere, the EU must finally conclude an agreement with MERCOSUR and further operationalize its Strategy for Cooperation in the Indo-Pacific.



Pivotal Powers and International Security: Toward Flexibility

By Gesine Weber

The distribution of power and influence in international security is becoming increasingly dispersed. The United States uncontestedly leads in terms of military spending¹⁶—\$916 billion in 2023. That is far ahead of China's outlay (\$296 billion) and Russia's (\$109 billion), the next two biggest spenders, and more than ten times the defense budget of each major European state. Does this imply that Washington also has the unique power to shape global security and that multipolarity is nothing but a myth, as some leading US scholars suggest?¹⁷

Not quite. While the United States' military lead will likely continue, a good case for a changing global security order can be made as other states emerge as increasingly relevant actors in circumstances in which Washington is unable or unwilling to act. The role of non-Western states in the wars in Ukraine and Gaza illustrate this trend. In 2022, Türkiye brokered the Black Sea Grain Initiative among the UN, Ukraine, and Russia, which allowed the shipment of food and fertilizer to mitigate the ramifications of the European conflict on global food security¹⁸. Similarly, Brazil started to position itself as a potential mediator with a peace plan, first in a relatively unspecified version in 2023¹⁹ and more recently through a more concrete six-point joint proposal with China.²⁰ Meetings between India's prime minister, Narendra Modi, and other high-ranking members of his government with their Russian and Ukrainian counterparts prompted speculation about another mediation effort.²¹ No less significantly, Qatar became an important player in attempts to reach a ceasefire in Gaza. Add in UN peacekeeping efforts—which, despite all criticism, remain the most significant deployments of international forces—and the picture is even more striking. As of July 2024, European countries and the United States were not among the top ten contributors of uniformed UN personnel, whereas Nepal, Rwanda, Bangladesh, and India are among the leading suppliers of troops.²²

Contributions to UN Peacekeeping Missions

Uniformed personnel as of July 31, 2024

RANK	COUNTRY	CONTRIBUTION
1	Nepal	6119
2	Rwanda	5876
3	Bangladesh	5866
4	India	5427
5	Indonesia	2741
6	Ghana	2626
7	Pakistan	2601
8	China	1801
9	Morocco	1701
10	Ethiopia	1538
16	Italy	989
25	Spain	696
28	France	592
78	United States	25

Source: United Nations Peacekeeping

The growing diversity of power that shapes regional conflicts with global humanitarian or security ramifications is clear. The idea that only the United States can provide the common good of security, often as defined in Washington, is outdated and empirically false. Even the track records of the United States (in Afghanistan and Syria), the EU (around the Mediterranean), or individual European states (such as France in Mali) challenge their credibility and legitimacy as actors in regional security crisis management.

The changing patterns of engagement in addressing regional and global security matters have brought in other states that play key roles—states referred to here as “pivotal powers”. Though there are more, Brazil, India, Nigeria, and Türkiye are particularly relevant examples in the realm of international security. They are playing or attempting to play the role of regional hegemony. They are among their regions’ biggest defense spenders and are involved in shaping regional security. The United States and Europe have doubled down in recent years on strengthening their ties with these countries to address security issues and enhance cooperation on these and other transnational challenges. Listening to pivotal powers’ officials, better understanding their national priorities, and including them as truly equal partners in foreign policy strategies is consequently of paramount importance.

Military spending of Pivotal Powers in 2023

COUNTRY	IN \$, BILLIONS	% of GDP	% of REGIONAL TOTAL	REGION*
BRAZIL	22.9	1.1	45	South America
INDIA	83.6	2.4	57	South Asia and Southeast Asia
NIGERIA	3.2	0.81	13	Sub-Saharan Africa
TÜRKIYE	15.8	1.5	7	Middle East

*as defined by SIPRI

Source: SIPRI Military Expenditure Database

Pivotal Powers’ Agendas

Brazil’s Priorities: Transnational and Environmental Crime

Policymakers in Brasilia see border security, drug trafficking, and domestic lawlessness as their greatest challenges. Since the 2016 peace treaty between the Colombian government and the FARC guerilla group, violence committed by those excluded from the agreement, some of which is linked to organized crime, has increased and spilled into neighboring countries. The Brazilian military is consequently occupied with addressing the domestic ramifications of this development. Brazilian security concerns encompass the rest of South America and the broader South Atlantic, but significant involvement there is not currently a Brazilian priority.

Brazil has long sought a highly autonomous foreign policy (the Jair Bolsonaro administration’s aim of aligning with the United States is an exception), though close relations with the American military are important. Cooperation with the United States on important security challenges such as corruption or organized crime, therefore, is a delicate balancing act. In general, the appetite for such cooperation, also with Europe, is limited because Brasilia often sees little to gain from it. Washington has not offered much in return for limiting trade with China. Except for defense sales, Europe is not even seen as a security partner. Other areas of cooperation with the transatlantic partners offer scant benefits, especially when compared with those associated with membership in Mercosur. In addition, Western debates on intervening in the Amazon as part of a global “responsibility to protect” it only raise red flags in Brasilia.²³

India’s Priorities: Border Conflicts and China’s Rise

The security challenges New Delhi perceives as most pressing are a legacy of the past and the result of new geopolitical dynamics in South Asia. Long-festering border disputes with Pakistan and China, which lead to regular clashes, remain a top concern for Modi and his government. But the biggest strategic challenge for India is dealing with China’s expanding regional influence. New Delhi perceives Beijing as a growing political, economic, and military

threat, especially given its policy in the South China Sea. India also deals with humanitarian crises in its immediate neighborhood, most prominently in Myanmar.

New Delhi's assessment of US and European involvement in these crises varies. It has no interest in seeing greater foreign involvement in resolving its border conflict with Pakistan. This is, in part, due to Washington's ties to Pakistan, which unsettle India. Nevertheless, given China's increasingly assertive behavior in the region, New Delhi, especially since a 2020 border clash with Chinese troops, has tilted westwards and enhanced strategic dialogue with the United States.²⁴ Regarding Europe, India welcomes the EU's humanitarian engagement to support civilians in Myanmar or Bangladesh and would appreciate even greater involvement, albeit without the criticism of New Delhi's approach to its own religious minorities. India also encourages increased European interest in the region, whether through the EU's Indo-Pacific strategy or the deployment of naval assets to the Pacific and Indian oceans by individual European states.

Nigeria's Priorities: Overseeing Regional Security

As sub-Saharan Africa's largest country, Nigeria has long seen itself as a "big brother" and a key security provider in the region. From its perspective, stability in the Sahel, coastal West Africa, and the Great Lakes region is critical. The fight against myriad terrorist groups such as al-Qaida in the Islamic Maghreb (AQMI), Boko Haram, or the Islamic State group requires significant state resources, but Abuja is content to lead the effort. It is also prepared to oversee the Multinational Joint Task Force that aims to ensure cross-border security in the Lake Chad basin region.²⁵

The United States and Europe have changed their approaches to sub-Saharan Africa in recent years. They have moved from extensive engagement and a large military footprint, such as France's Operation Barkhane with its more than 5,000 troops in the Sahel, to focusing on enhancing capacity-building in the region's countries. For Abuja, Washington's shift to an "African-led and US-enabled" strategy²⁶ and offers of technical assistance and training is a blueprint for successful cooperation. It equips the Nigerian military to address regional security challenges more effectively and provides Abuja with US political support, both of which raise Nigeria's legitimacy as a regional actor. The EU's Coordinated Maritime Presence in the Gulf of Guinea, which Abuja also welcomes, could be similarly enhanced to emphasize mutual security and trade benefits, and to address Nigerian concerns about the risk of European exploitation of regional resources. It could also mitigate animosity in Abuja about French support for military governments that have overthrown West African democracies.

Türkiye's Priorities: Finding Security in an Insecure Region

As a bridge between Europe, the Middle East, and Central Asia, Türkiye has a challenging geographic position, one that shapes Ankara's perception of its most important security challenges. In fact, many of the world's most violent, recent conflicts and humanitarian catastrophes were or are located on Türkiye's borders. The civil war in Syria, more than a decade old, sparks fears in Ankara of terrorism from Kurdish and Syria-based groups. Russia's 2014 annexation of Crimea and 2022 full-scale invasion of Ukraine brought another conflict to Türkiye's neighborhood,

requiring Ankara, in its view, to pursue a balanced approach to the Kremlin, one conducted through deterrence of and cooperation with it.

Türkiye, despite being a NATO member, has not seen US and European involvement in tackling these challenges as helpful. Washington's support for the Kurdish People's Protection Units' (YPG) fight against the Islamic State group in Syria ignored the concerns of Türkiye, which considers the former to be a terrorist organization. Ankara also views EU insistence on the lifting of antiterrorism laws in return for a more liberal visa regime and progress in the accession process as undermining Turkish security concerns.

No Lecturing or Hectoring

Pivotal powers also often view US and European involvement in regional security challenges as patronizing and the result of double standards. The West may proclaim the importance of the principles of a rules-based international order, but pivotal powers perceive lectures on democracy as meddling in domestic affairs. It is unsurprising, for example, that Western criticism of Modi's treatment of religious and ethnic minorities has not bolstered ties.

Irritation also arises with US calls for alignment with its policies toward China or European calls to do the same vis-à-vis Russia. Such approaches suggest that the transatlantic partners have little consideration for pivotal powers' interests and priorities. These approaches also suggest that the West views pivotal powers simply as leverage in strategic geopolitical competition. The calls ring even more hollow given the increasing popularity of US and European forces sympathetic to Moscow and the West's continuing strong business links with China.

What can Europeans and the United States do to enhance their relevance and credibility as partners for the pivotal powers? One approach is to shift from patronizing to empowering behavior, and the United States and the EU already have practices in place, such as in Nigeria, that can serve as a blueprint for doing that. These efforts, however, should be tweaked so that they are not framed as components of US-China competition but as endeavors to bolster regional security.

Does this imply that Europe and the United States should stop voicing human rights concerns? No, but the transatlantic partners would benefit from a more compartmentalized approach. Rather than imposing conditions or using a carrot-and-stick approach to reach agreements on security cooperation, the transatlantic community would be better served by recognizing pivotal powers' red lines. Furthermore, public criticism of pivotal powers' human rights record or of domestic political developments will erode trust and risk fueling animosity through accusations of neocolonialism. Some matters are best left for private consultation.

Expanding areas of cooperation would also improve relationships between the transatlantic partners and the pivotal powers. Abuja, Ankara, Brasilia, and New Delhi need capabilities to autonomously address regional security challenges, and all are interested in strengthening defense ties with the United States and Europe. If they do not meet that need, the four will only look elsewhere for support. Russia has already supplied Türkiye with S400 missile systems and is India's main weapons supplier, accounting for 36% of that country's armaments imports between

2019 and 2023.²⁷ The Kremlin also exports military equipment to Brazil and Nigeria, albeit to a lesser extent. This is evidence that capability acquisition takes precedence over supplier and Western notions of morality.

But joint development and technology transfer are pivotal powers' ultimate aim, and this provides a critical opening for the United States and Europe. Both should consider the opportunity even if it requires revising policies on weapons exports and defense industrial cooperation. In this regard, US defense cooperation with India could constitute a blueprint for Europe to enhance its ties with New Delhi.

While deepening cooperation would benefit all involved, pressuring pivotal powers to formalize partnerships through alliances would be counterproductive. Each such power perceives the downsides and risks of alliances as clearly outweighing the benefits. Their pursuit of policies that lead to multiple, fluid alignments, or cooperation on a case-by-case basis, is meant to keep their options open and prevent constraints on links to any global power. Pivotal powers also want to avoid becoming trapped in formal relationships that make them vulnerable to coercion to act in ways that contradict national interests or a grand strategy.

An exception among the four pivotal powers in this regard is Türkiye, which, as a NATO member, is formally allied to the alliance's North American and European members. Ankara's relations with the EU, despite many mutual frustrations and the bloc's frozen enlargement process, remain closer than Brussels' ties to other pivotal powers. The 2016 migration agreement is one example of these special links. But they do not constrain Türkiye's interactions with Russia or China, including on military issues.²⁸

The reluctance among pivotal powers to engage in formal alliances requires the West to rethink options for engaging with pivotal powers. For the United States, this means shifting away from framing an increasing number of global security challenges, such as terrorism or regional conflict, as components of US-China competition or a confrontation between a Western-led bloc and a Russia-China-Iran-North Korea axis. A continuation of this approach only solidifies the impression among pivotal powers that Washington's engagement is an attempt to bind them into alliances that boost American leverage over China. For Europe, this means intensifying multilateral cooperation formats and initiatives, especially through the EU, on a broader range of security issues. The increased collaboration would signal that Europe is not forcing pivotal powers and other regional stakeholders to pick a side in the competition among great powers.

A New Approach

Strategic partnerships increasingly characterize the nature of US and European cooperation with pivotal powers and should be strengthened. These relationships are likely to fall short of alliances, but they can take the form of joint research and development projects or contracts for military equipment. Engagements such as these enable pivotal powers to be recognized as equals with individual agency. This approach, which may be perceived as "transactional" from a transatlantic perspective, does not imply that pivotal powers are interested only in ad hoc deals. The transatlantic partners must also find a middle road for security cooperation with pivotal powers that neither formalizes cooperation in alliances nor clings to a short-term mindset. Informal minilateral formats offer a

promising solution. The Quad, which brings together Australia, India, Japan, and the United States, or the trilateral cooperation among France, India, and the United Arab Emirates, are forums that deepen political ties, build trust, and address security challenges without a formal, institutionalized process. In other words, flexibility is key.

A new US and European approach to pivotal powers should start with a recognition that shaping international security need not be a zero-sum game. India expects the transatlantic partners to acknowledge its rise as beneficial for global security. Similarly, Nigeria has a role to play in a region from which the West has been largely ejected. Recognition of these aspirations, and Türkiye's role and political weight at a crossroads of Europe and Asia, would benefit the often-turbulent relationships that the transatlantic partners have with these countries. In addition, the transatlantic partners must adapt their narratives to pivotal powers' histories and domestic politics to ensure that statements and actions are not perceived as neocolonial.

The United States and Europe should see the potential of pivotal powers to shape regional conflicts and to play expanded global roles as opportunities. The past zero-sum logic that sees the rise of some states as necessitating the inevitable decline of others must give way to an approach that offers benefits to all. In other words, the United States and Europe must allow greater involvement of pivotal powers in addressing regional and global security challenges. Ensuring that a greater diversity of voices is heard will enhance an image of the United States and Europe as responsible actors. Their clinging to a unipolar American-led order that no longer exists would serve only to isolate them on an increasing number of issues of global consequence.

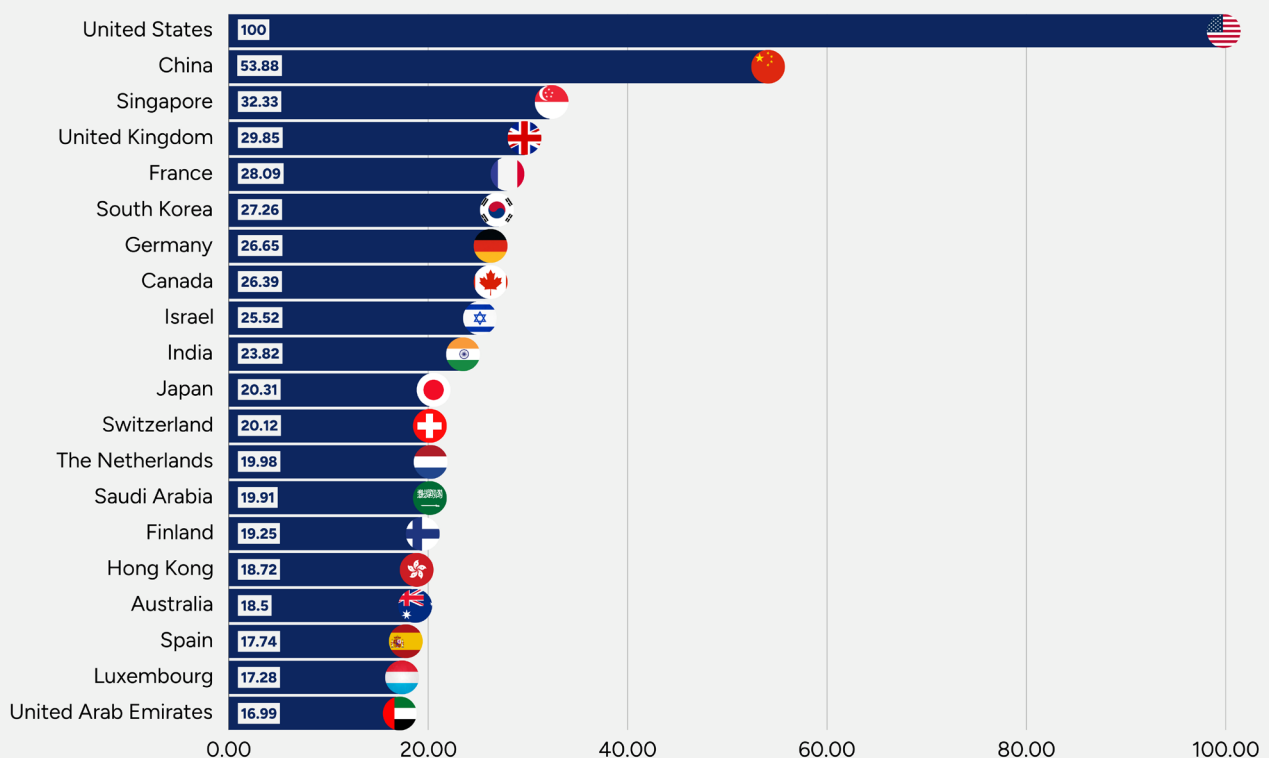


The Dawn of Pivotal Powers in Artificial Intelligence

By Sharinee L. Jagtiani and Kristina Kausch

A universal force multiplier, artificial intelligence (AI) is likely to be among the elements to influence the geopolitical balance of power in a newly emerging global order. The United States and China have already placed the technology front and center among their national priorities.²⁹ But AI's evolution and governance is less likely than those of other technological breakthroughs to rest solely on the decisions of great powers.³⁰ Certain middle powers also seek to influence the rules.³¹ They see AI as an opportunity to boost their economic, military, political, and socio-cultural competitiveness, and their prestige on the world stage.³² Further, AI is a unique emerging technology that relies on a complex and diverse supply chain that middle powers can leverage geopolitically. As a result, a new category of pivotal powers in the international order is emerging, one that is investing in AI. India and Saudi Arabia are among the key cases. Ranked, respectively, 10th and 14th globally in terms of overall AI capacity (see graphic below), both countries are looking to AI to advance their strategic interests and their regional and global leadership positions.³³

Global Ranking of AI Capacity



Geopolitical Opportunities on the AI Value Chain

Pivotal AI powers seek to raise their geo-economic and geopolitical power by leveraging comparative advantages along specific points on the AI value chain. The key building blocks required to develop and/or deploy large-scale AI power include:

- human capital: talent pool, research institutions
- data: large datasets, data privacy and security frameworks
- compute: technological infrastructure including high-performance graphic processing units, hardware accelerators, cloud computing platforms, and research and development facilities such as laboratories and innovation hubs
- energy: large-scale power levels required to sustain high-performance compute
- finance: access to public and private finance for startups, research, and large-scale initiatives
- regulation: policies, strategies, and laws that support innovation while addressing ethical/security concerns; intellectual property protection; roles in global regulatory forums
- connectivity: high-speed internet; supportive ecosystems for technology hubs, incubators, accelerators, and industry partnerships
- partnerships: international and public-private collaboration
- trust: ethical standards for responsible AI, public awareness, and knowledge of AI

Among AI's building blocks, computational infrastructure is increasingly key as the computing power needed to train AI frontier models roughly doubles every six months. Training and deploying large-scale AI models requires large data centers, and the countries that host them gain geopolitical advantage. Some governments have consequently adopted industrial policies aimed at securing sufficient supplies of AI compute for local industries and researchers, and at preventing technology leakage.³⁴

Despite a broad global consensus on the need to ensure AI's responsible use, however, developing an enforceable framework for its governance is proving increasingly difficult. Middle powers outside the G7, wary of entrenched Western influence in this effort, have been seeking to influence AI governance debates.

India and Saudi Arabia illustrate the emergence of pivotal powers in the global AI landscape. Both are leveraging their assets—data and human capital in India's case; investment in AI infrastructure in Saudi Arabia's—to carve out critical roles in the new technology's development. Both are also striving to capitalize on the current geopolitical moment to

advance their AI interests, but their success here hinges on their ability to balance their position between the great powers competing for technological domination.

India's AI Bid for Equitable Global Governance

AI is an area in which India is leveraging its rapidly advancing technological capabilities to transform itself into a significant global power. In 2024, the country launched its "AI Mission" under the slogan "AI for All", underscoring its goal to leverage the technology for progress at home and in the developing world more broadly.³⁵ India has also emphasized the importance of "responsible AI", with a focus on openness, safety, trust, and accountability³⁶ to avoid becoming a testing ground for other states and for technology giants from which it demands greater accountability.³⁷ New Delhi seeks to play a pivotal role across the entire AI supply chain, spanning research, development implementation, and governance.

India's 2018 National Strategy for Artificial Intelligence (NSAI) has informed the country's AI Mission, which falls under the Ministry of Electronics and IT (MeitY).³⁸ MeitY received its first \$1.25 billion allocation for the initiative in its 2024-2025 budget.³⁹ The funding aims to strengthen all aspects of the AI value chain, especially compute. Human talent and data, however, remain India's core strengths, and they are closely linked to the country's being the world's youngest and most populous nation.⁴⁰ India also boasts the highest AI skills penetration globally, and AI-skilled individuals in the country have grown 14-fold over the past seven years.⁴¹ In addition, India's controversial but rapid digitization over the past two decades, driven by initiatives that include financial inclusion, biometric identity programs, and widespread mobile adoption, have generated vast amounts of data.⁴² This has led India to introduce technical protocols for "data empowerment" and enacted a personal data protection law to allow publicly available data to be used for AI training.⁴³

Political leaders have emphasized that the country's approach to AI will follow its approach to digital public infrastructure (DPI), which relies on government-backed application programming interfaces that third parties, including the private sector, can use to build software that connects with state services.⁴⁴ These leaders have also emphasized that "this kind of public-private partnership approach is neither there in the west nor in the east."⁴⁵ DPI was the focus of India's G20 presidency and has UN endorsement. It was also featured in a joint statement with United States.⁴⁶ New Delhi also aims to create a public platform for AI on which all relevant resources and information will be made available.⁴⁷

Beyond its domestic aspirations, India seeks to be a "voice for the 'Global South'" in global AI governance.⁴⁸ As part of this effort, the country has participated in forums such as the Global Partnership on AI (GPAI) and the UN's multistakeholder Advisory Committee on AI. As 2024 GPAI chair, India successfully advocated for restructuring the group to ensure equal standing for members and non-members of the Organisation for Economic Co-operation and Development.⁴⁹ It also called during G7 outreach sessions that same year for an end to a monopoly on AI.⁵⁰

Given the technological race that underpins US-China strategic competition, India's focus on AI is already yielding geopolitical benefits. The country is maintaining its long-standing commitment to strategic autonomy but is simultaneously strengthening its ties with the West. Emerging technology, especially AI, has been key to enhancing strategic partnerships with the United States, the United Kingdom, and the EU.⁵¹ This indicates that gestures, such as India and China's recent agreement to ease border tensions, are unlikely to steer New Delhi away from its westward turn.

Despite India's bid for a global AI role, some rankings highlight a gap between its current and potential capabilities. The Oxford Insights Government AI Readiness Index 2023 ranked India 40th out of 193 countries, reflecting its strong talent and lagging infrastructure and innovation.⁵² Nonetheless, India's efforts to establish equitable AI global governance and its assets along the AI value chain secure its position as a pivotal AI power.

Saudi Arabia's AI Gold Rush

Using its privileged oil wealth strategically, Saudi Arabia has undertaken a massive generational transformation effort aimed at morphing its hydrocarbon rentier state profile into one of a technology power. Crown Prince Mohammed bin Salman's Agenda 2030 requires AI for fully two-thirds of the measures contemplated, and digital technologies form the cornerstone of the Agenda's diversification and modernization effort. A vast surge in investment in AI-related industries, research, talent, and infrastructure involve amounts that dwarf major Silicon Valley undertakings. The kingdom has become an El Dorado for technology investors.⁵³

Saudi AI investment in recent years has been dazzling. In 2024, Riyadh created a \$100 billion fund for investment in digital technologies. It is also in talks with Silicon Valley venture capital firms and other investors to invest an additional \$40 billion. The country is today the largest digital market in the Middle East and North Africa.⁵⁴

The Saudi Data & AI Authority (SDAIA) launched in 2020 the National Strategy for Data & AI to drive the national AI transformation and establish the kingdom as a global leader in the field.⁵⁵ SDAIA has legislative power and, since its establishment in 2019, has adopted 14 AI-related regulations and policies, including a personal data protection law, AI ethics principles, and guidelines for generative AI. The enormous speed and tight strategic outlook with which the country has developed its AI sector has earned it a respectable place in global AI rankings. Tortoise's 2024 AI Index, for example, ranks Saudi Arabia first for government strategy and 14th overall.⁵⁶ In global debates on AI governance, the country has supported the G20's endeavors to promote equitable AI governance and achieved greater representation for itself (a Saudi member was appointed in 2023 to the UN Secretary-General's High-Level Advisory Body on AI) although Riyadh has yet to have any meaningful impact on governance deliberations.

To build a robust domestic AI infrastructure, Saudi Arabia's strategy focuses on data center capacity, high-performance computing capabilities, and scalable cloud computing services. Five of Saudi Arabia's municipalities are among the world's top 100 smart cities.⁵⁷ The country's domestic cloud market grew by 30% between 2022 and 2023. By 2030, the government expects public spending on domestic cloud infrastructure to grow 23% annually

and investment in data centers to reach \$15 billion. There is also an emphasis on human resources. Since 2018, the number of workers in Saudi Arabia with AI skills has doubled annually. Scientific publications on AI grew by 45% over the same period while AI-related patents jumped 50%. This has led, unsurprisingly, to high public awareness of AI. According to government data, 75% of Saudis are familiar with the general concept of AI and 64% are knowledgeable about AI use cases and apps.⁵⁸

The Saudi spending party, however, risks glossing over concerns that AI may help consolidate authoritarian governance. The kingdom is a theocratic monarchy with a dire human rights record. Chinese surveillance systems are already widespread in public sphere, and digital rights organizations warn of the risks of boosting Saudi technological capacity.⁵⁹ While the gruesome killing of Saudi dissident Jamal al-Khashoggi, reportedly upon Crown Prince Mohammed's direct order, dampened investors' enthusiasm for a while, those concerns appear to have faded in the light of international enthusiasm about the Saudi AI bonanza.

Saudi Arabia employs its comparative advantages—money and energy—to establish itself as a leading player in AI. By shaping its future as an AI power while oil money is still flowing, the kingdom is investing in a future that substitutes a dying geopolitical asset with a nascent one. However, geopolitical considerations remain. Riyadh will need to continue its delicate act of balancing relations with the United States, its main security partner, with China, its main trading partner, and Russia, its main oil ally in the Organization of Petroleum Exporting Countries. So far, to Washington's chagrin, Riyadh has resisted technological alignment with the West, even if it has reportedly started to limit ties with Chinese technology firms.⁶⁰ As a result, the United States has restricted exports of AI chips to the Middle East. Washington remains concerned that the Persian Gulf's burgeoning technology hub could become a conduit for Beijing to obtain advanced chips and has, therefore, in addition to barring US producers from direct shipping to China, restricted import of AI chips to the Middle East. Saudi Arabia's ability to balance its desired neutrality among the great powers with its dependence on the United States for security is set to become untenable.

Transatlantic Policy

The cases of India and Saudi Arabia illustrate the emergence of pivotal powers in the global competition for technological primacy. To maximize the opportunities and mitigate the risks associated with this, transatlantic policy should consider the following:

Boost engagement on AI with a mindset of equity: While transatlantic states, corporations, and research institutions should deepen their engagement with pivotal powers on AI, they should do so mindful of these players' interests and concerns. Although power in AI now chiefly lies in EU, US, and Chinese hands, Washington and Brussels cannot strategically afford to dictate the rules for a global technological revolution that will shape the lives of generations. Rather than seeing southern technology powers as mere friendshoring opportunities, and talent and raw material reservoirs, the transatlantic partners should craft cooperation in AI as a partnership that considers each side's needs and assets.

Seize opportunities in value chain diversification and integration: Despite the careful balancing this requires, the transatlantic partners should work with pivotal powers in AI to diversify value chains and critical infrastructure for mutual benefit. In an emerging bipolar world, shorter and diverse value chains can help distribute risk and ease geopolitical pressures. Pivotal AI powers' emerging comparative advantages should be incorporated into EU and US industrial and foreign policies.

Seize opportunities from AI pivotal powers' aspirations to act as a voice for the "Global South": Concerns about the AI revolution's ability to widen the gap between industrialized and nonindustrialized countries, with the latter lacking the resources, expertise, and infrastructure to keep pace with emerging technologies. This poses a challenge for EU and US efforts to promote inclusive policies, but rising pivotal powers in technology with influence in the developing world could leverage their position to advocate for greater global inclusion and equity. These powers could also use their comparative advantages to develop scalable AI applications and services tailored for deployment in the developing world.⁶¹

Mitigate the risk of losing AI pivotal powers to China or Russia: Pivotal powers' frequent approach to cultivating multiple strategic partnerships is inherently transactional from a transatlantic perspective.⁶² Given a global trend in de-risking, this strategy is likely to create friction, particularly with Washington. US policymakers are rightfully concerned about the risk of American technology leakage into China or Russia. The EU and the United States should coordinate on establishing outbound investment regimes that limit such leakage in countries that collaborate with Beijing or Moscow on technology.

Devise policies and mobilize funds to counter AI risks of enabling or entrenching authoritarianism: AI can boost domestic and international authoritarian practices. Digital rights groups are concerned about surveillance, biometric screening, and AI-powered disinformation and defamation, especially as AI pivotal powers are already mobilizing the technology to consolidate domestic power. The transatlantic partners should consider the views of civil society actors in any AI collaboration with pivotal powers.

Adopt a multi-stakeholder approach: The AI revolution is driven by non-state actors including corporations, trade associations, the technology community, and civil society. EU and US policy planning must involve all stakeholders if it is to have geopolitical clout.



G | M | F

THE GERMAN MARSHALL FUND
OF THE UNITED STATES

1746

Policy Recommendations

Martin Quencez and Rachel Tausendfreund

For the transatlantic partners

1. Change the tone

The US and European approach to pivotal powers is often perceived as moralistic and sanctimonious rather than an engagement among equals. The transatlantic allies must abandon the idea that they know what is in the best interest of other countries. The diplomatic costs of public criticism should be assessed carefully. While this does not mean dropping all references to human rights or universal values, it does mean entering discussions informed about the interlocutor's perspective and that dialogue behind closed doors is more likely to reach a common understanding than public speeches.

2. Embrace minilateralism

Pivotal powers are engaged in a strategy of multi-alignment to maximize their interests. Transatlantic partners need to strike the right balance between transactionalism and formal alliance-building. Minilateral formats of cooperation, often dedicated to a specific policy issue, are the most promising frameworks for engagement with pivotal powers. But this requires enhancing transatlantic coordination to benefit collectively from existing privileged relationships rather than competing for attention in the "Global South". And EU-US demands for exclusivity hamper uptake. Transatlantic efforts to develop digital connectivity or clean energy production must happen parallel to Chinese Belt and Road Initiative projects.

3. Improve coordination on de-risking policy

Pivotal powers express great interest in military and technology cooperation with transatlantic partners. While American and European de-risking strategies make sense in theory, they usually appear to others as inconsistent and untransparent. A more coordinated regime to control financial investments, arms sales, and technology transfers to pivotal powers would help leverage these exchanges. As the Trump administration is expected to implement new and stricter trade and technology policies toward China, deconflicting US and EU approaches should be a transatlantic priority.

4. Negotiate joint ventures

The United States and Europe should pursue, using a multistakeholder approach, joint ventures with companies in pivotal powers that build capacity there in clean energy technologies, digital infrastructure, or artificial intelligence. Joint purchasing could be included, if appropriate, as well as co-developing rules and funding. US and EU standards can seep into these efforts but should not be unilaterally imposed at the outset. Capacity building and investment in local manufacturing can support partner countries in their efforts to move up the

value chain. This approach would be compatible with the Partnership for Global Infrastructure and Investment or the EU-US Trade and Technology Council.

5. Pursue partnership together and individually

The EU, the United States, and other partners should join forces to create ambitious regional initiatives that aggregate resources. These efforts can combine infrastructure, clean energy, or green technologies with digital infrastructure investment and partnership activities in strategic corridors. The G7’s Just Energy Transition Partnership is a model for collaboration in other sectors. Partners could also coordinate their tackling of different projects in the same region to ensure compatibility.

For the EU

1. Ensure coherence between the Green Deal and the Global Gateway

The EU’s global engagement, as it combines efforts by the bloc and its individual member states, struggles with cohesion problems. Efforts to support EU decarbonization and competitiveness, such as the Emissions Trading System and the Carbon Border Adjustment Mechanism, have detrimental effects that run counter to Global Gateway aims. The Global Gateway’s objective should be aligned with the new European Commission’s priorities for competitiveness and decarbonization. Furthermore, the flurry of initiatives (e.g., for energy partnerships and green technology partnerships) should be merged into one effort with a clear strategic vision, perhaps into the Clean Trade and Investment Partnerships, as the European Commission recently proposed.⁶³

2. Maintain a multilateral trade focus

There is pressure to move toward national industrial policy to achieve resilience and a competitive green transition. The World Trade Organization (WTO), however, was not built to address today’s challenges, yet the multilateral system was essential to increasing global prosperity. The EU and its member states should remain strong advocates of WTO reform and keep this in mind while moving forward with their strategic green agenda. Donald Trump’s reelection, and the prospect of tariffs on all US imports, could offer new opportunities for the EU’s trade relations with pivotal powers.

3. Remember that development policy and human rights are relevant to geopolitics

“Geopolitical Europe” should continue to infuse EU policy areas with more strategic thinking. Development policy and human rights play a traditionally significant role in relations between Europe and many “Global South” actors. The issues cannot be isolated from the geopolitical interests that Europeans rightfully prioritize. Such a separation fosters an impression of hypocrisy and incoherence.

Endnotes

¹ We use the term “Global South” as a synonym for countries with developing and least developed economies, according to UNCTAD classification. This includes countries such as Türkiye and Mexico, which are not always considered “Global South” because of their alliances and economic development.

² Dino Patti Djatal, “Middle Powers are the new architects of the world order”, *Nikkei*, July 4, 2024. <https://asia.nikkei.com/Opinion/Middle-powers-are-the-new-architects-of-the-world-order>

³ According to the Lowy Institute Asia Power Index, “In 2024, Indonesia gained 2.9 points, more than any other Index country and making it the nation with the highest overall growth in power since the inception of the Index in 2018.” Lowy Institute Asia Power Index 2024 Edition, Lowy Institute. <https://power.loyyinstitute.org/countries/indonesia/>

⁴ Lowy Institute Global Diplomacy Index. https://globaldiplomacyindex.loyyinstitute.org/country_ranking

⁵ When not otherwise stated, quotes are from an interview with a country policymaker or expert.

⁶ Harsh V Pant, “The Year India Engaged the World on Its Own Terms”, *Observer Research Foundation*, December 28, 2023. <https://www.orfonline.org/research/the-year-india-engaged-the-world-on-its-own-terms>

⁷ *Ibid.*

⁸ C. Raja Mohan, “At G20, the end of old multilateralism – and the beginning of new order”, *Indian Express*, September 7, 2023. <https://indianexpress.com/article/opinion/columns/east-asia-summit-absence-of-russian-president-vladimir-putin-chinese-president-xi-jinping-asian-neighbours-8926273/>

⁹ ANTARA, “Indonesia continues to strive for UN reform agenda: Foreign Ministry”, May 30, 2024. <https://en.antaranews.com/news/314769/indonesia-continues-to-strive-for-un-reform-agenda-foreign-ministry>

¹⁰ Interview with Priyal Singh, senior researcher, *Africa in the World*, Institute for Security Studies, October 2024.

¹¹ Priyal Singh, “Wheels come off South Africa’s hollow version of non-alignment”, *Institute for Security Studies*, May 22, 2023. <https://www.polity.org.za/article/wheels-come-off-south-africas-hollow-version-of-non-alignment-2023-05-23>

¹² International Court of Justice, *Application of the Convention on the Prevention and Punishment of the Crime of Genocide in the Gaza Strip*, October 9, 2024. <https://www.icj-cij.org/case/192>

¹³ Interview with Priyal Singh.

¹⁴ African National Congress 55th National Conference Relations, December 20, 2022. <https://www.anc1912.org.za/wp-content/uploads/2023/02/ANC-55th-Conference-Resolutions-INTERNATIONAL-RELATIONS.pdf>

¹⁵ James Guild, “How the UAE is Making a Splash in Indonesia’s Clean Energy Sector”, *The Diplomat*, January 18, 2024. <https://thediplomat.com/2024/01/how-the-uae-is-making-a-splash-in-indonesias-clean-energy-sector/>

¹⁶ Nan Tian, Diego Lopes Da Silva, Xiao Liang, and Lorenzo Scarazzato, “Trends in World Military Expenditure, 2023”, *SIPRI*, April 2024. https://www.sipri.org/sites/default/files/2024-04/2404_fs_milex_2023.pdf

¹⁷ Stephen G. Brooks and William C. Wohlforth, “The Myth of Multipolarity”, *Foreign Affairs*, April 18, 2023. <https://www.foreignaffairs.com/united-states/china-multipolarity-myth>

¹⁸ *Le Monde/AFP*, “Russia, Ukraine seal grain deal in Istanbul”, July 22, 2022. https://www.lemonde.fr/en/international/article/2022/07/22/russia-ukraine-seal-grain-deal-in-istanbul_5991090_4.html

¹⁹ Monica Hirst and Juan Gabriel Takatlian, "How Brazil wants to end the war in Ukraine", *International Politics and Society*, July 6, 2023. <https://www.ips-journal.eu/topics/democracy-and-society/how-brazil-wants-to-end-the-war-in-ukraine-6826/>

²⁰ Government of Brazil, "Brazil and China present joint proposal for peace negotiations with the participation of Russia and Ukraine", May 23, 2024. <https://www.gov.br/planalto/en/latest-news/2024/05/brazil-and-china-present-joint-proposal-for-peace-negotiations-with-the-participation-of-russia-and-ukraine>

²¹ Gabriel Dominguez, "India emerges as player in bid to mediate end to Ukraine war", *The Japan Times*, July 31, 2024. <https://www.japantimes.co.jp/news/2024/07/31/asia-pacific/politics/india-ukraine-war-mediator-analysis/>

²² United Nations Peacekeeping, *Uniformed Personnel Contributing Countries by Ranking (as of July 31, 2024)*. https://peacekeeping.un.org/sites/default/files/02_country_ranking_76_july_2024.pdf

²³ Stephen M. Walt, "Who Will Save the Amazon (and How)?", *Foreign Policy*, August 5, 2019, <https://foreignpolicy.com/2019/08/05/who-will-invade-brazil-to-save-the-amazon/>

²⁴ Garima Mohan, "India: Tilting Westwards", in *The German Marshall Fund of the United States, "Alliances in a Shifting Global Order"*, 2023. <https://www.gmfus.org/download/article/22154>

²⁵ Multinational Joint Task Force, "About The Force". <https://mnjtfmm.org/about/>

²⁶ United States Department of State, "Digital Press Briefing on the New AFRICOM Strategy and U.S. Military Cooperation in Africa", September 12, 2024. <https://www.state.gov/digital-press-briefing-on-the-new-africom-strategy-and-u-s-military-cooperation-in-africa/>

²⁷ Tian, Lopes Da Silva, Xiao, and Scarazzato, "Trends in World Military Expenditure, 2023".

²⁸ Emil Avdaliani, "Turkey and China Seek Rapprochement, Though It Will Be Limited in Scope", *Stimson Center*, July 12, 2024. <https://www.stimson.org/2024/turkey-and-china-seek-rapprochement-though-it-will-be-limited-in-scope/>

²⁹ National Artificial Intelligence Research and Development Strategic Plan 2023 Update, Select Committee on Artificial Intelligence, National Science and Technology Council, May 2023. <https://www.whitehouse.gov/wp-content/uploads/2023/05/National-Artificial-Intelligence-Research-and-Development-Strategic-Plan-2023-Update.pdf>; Outline of the 14th Five-Year Plan for National Economic and Social Development and the Long-Range Objectives Through the Year 2035 for People's Republic of China, The State Council, The People's Republic of China, March 13, 2021. https://www.gov.cn/xinwen/2021-03/13/content_5592681.htm

³⁰ Perry World House, "Artificial intelligence beyond the superpowers", *Bulletin of the Atomic Scientists*, August 16, 2018. <https://thebulletin.org/2018/08/the-ai-arms-race-and-the-rest-of-the-world/>

³¹ David Elliott, "Middle powers: What are they and why do they matter?", January 26, 2024. *World Economic Forum*, January 26, 2024. <https://www.weforum.org/agenda/2024/01/middle-powers-multilateralism-international-relations/>

³² See, e.g., Qimiao Fan and Christine Zhenwai Qiang, "Tipping the scales: AI's dual impact on developing nations", *The World Bank*, June 3, 2024. <https://blogs.worldbank.org/en/digital-development/tipping-the-scales--ai-s-dual-impact-on-developing-nations>; Chinasa T. Okolo, "AI in the Global South: Opportunities and challenges towards more inclusive governance", *Brookings Institution*, November 1, 2023. <https://www.brookings.edu/articles/ai-in-the-global-south-opportunities-and-challenges-towards-more-inclusive-governance/>

³³ Tortoise Media, "The Global AI Index 2024", 2024. <https://www.tortoisemedia.com/intelligence/global-ai/>

³⁴ V. Lehdonvirta, B. Wu, and Z. Hawkins, "Compute North vs. Compute South: The Uneven Possibilities of Compute-based AI Governance Around the Globe", accepted at the 7th AAAI/ACM Conference on AI, Ethics, and Society, October 21-23, 2024. <https://ora.ox.ac.uk/objects/uuid:6306c118-58ca-49ba-b7a0-4ee7b9423d5a>

³⁵ National Mission for Artificial Intelligence, India Science, Technology and Innovation Portal. <https://www.indiascienceandtechnology.gov.in/st-visions/national-mission/national-mission-artificial-intelligence>

³⁶ Narendra Modi, as quoted in: "PM addresses G20 Digital Economy Ministers' Meet", Prime Minister's Office, August 19, 2023. <https://pib.gov.in/PressReleaseIframePage.aspx?PRID=1950321>

³⁷ Murali Krishnan, "India eyes digital law to rein in Google, tech giants", Deutsche Welle, May 9, 2024. <https://www.dw.com/en/india-eyes-digital-law-to-rein-in-google-tech-giants/a-70140566>

³⁸ Government of India (NITI Aayog), "National Strategy for Artificial Intelligence", June 2018. <https://www.niti.gov.in/sites/default/files/2023-03/National-Strategy-for-Artificial-Intelligence.pdf>

³⁹ Ministry of Electronics and Information Technology, "Cabinet Approves Over Rs 10,300 Crore for IndiaAI Mission, will Empower AI Startups and Expand Compute Infrastructure Access", March 7, 2024. <https://pib.gov.in/PressReleasePage.aspx?PRID=2012375>

⁴⁰ United Nations, "India overtakes China as the world's most populous country", UN Department of Economic and Social Affairs, Policy Brief No. 153, April 24, 2023.

⁴¹ BCG and NASSCOM, "AI Powered Tech Services: A Roadmap for Future Ready Firms", February 2024. <https://web-assets.bcg.com/f6/5a/abdb70be44749d78ef21fafc89c5/ai-powered-tech-services-a-roadmap-for-future-ready-firms.pdf>

⁴² Bertelsmann Stiftung, "The Role of Indian Data for European AI", 2020. https://www.bertelsmann-stiftung.de/fileadmin/files/user_upload/The_Role_of_Indian_Data_for_European_AI.pdf

⁴³ Amlan Mohanty and Shataktratu Sahu, "India's AI Strategy: Balancing Risk and Opportunity", Carnegie India, February 22, 2024. <https://carnegieendowment.org/posts/2024/02/indias-ai-strategy-balancing-risk-and-opportunity?lang=en>

⁴⁴ India Stack, "India Stack is". <https://indiastack.org/>

⁴⁵ Benjamin Parkin and John Reed, "The India Stack: opening the digital marketplace to the masses", Financial Times, April 20, 2023. <https://www.ft.com/content/cf75a136-c6c7-49d0-8c1c-89e046b8a170>

⁴⁶ United Nations Development Programme, Digital Public Infrastructure. <https://www.undp.org/digital/digital-public-infrastructure>; The White House, Joint Statement from the United States and India, June 22, 2023. <https://www.whitehouse.gov/briefing-room/statements-releases/2023/06/22/joint-statement-from-the-united-states-and-india/>

⁴⁷ Ashutosh Mishra, "India will follow a DPI-like approach for artificial intelligence: Vaishnav", Business Standard, July 3, 2024. https://www.business-standard.com/technology/tech-news/india-will-follow-a-dpi-like-approach-for-artificial-intelligence-vaishnav-124070300905_1.html

⁴⁸ Ministry of Electronics and Information Technology, "Two days' Global INDIAai Summit 2024 concludes", July 4, 2024. <https://pib.gov.in/PressReleaseIframePage.aspx?PRID=2030838>

⁴⁹ Soumyarendra Barik, "In 'integrated partnership' of global AI group with OECD, some trade-offs for India", Indian Express, July 4 2024, <https://indianexpress.com/article/business/in-integrated-partnership-of-global-ai-group-with-oecd-some-trade-offs-for-india-9431432/>

- ⁵⁰ Ministry of External Affairs, "English translation of Prime Minister Shri Narendra Modi's address at the Outreach Session of the G7 Summit", June 14, 2024. https://www.mea.gov.in/Speeches-Statements.htm?dtl/37874/English_translation_of_Prime_Minister_Shri_Narendra_Modis_address_at_the_Outreach_Session_of_the_G7_Summit
- ⁵¹ Ministry of External Affairs, "Transcript of Special Briefing on Prime Minister's Visit to Russia", October 23, 2024. https://www.mea.gov.in/media-briefings.htm?dtl/38459/Transcript_of_Special_Briefing_on_Prime_Ministers_Visit_to_Russia_October_23_2024
- ⁵² Oxford Insights, "Government AI Readiness Index", December 6, 2023. <https://oxfordinsights.com/wp-content/uploads/2023/12/2023-Government-AI-Readiness-Index-1.pdf>
- ⁵³ Adam Satariano and Paul Mozur, "To the Future': Saudi Arabia Spends Big to Become an A.I. Superpower", The New York Times, April 26, 2024. <https://www.nytimes.com/2024/04/25/technology/saudi-arabia-ai.html>
- ⁵⁴ Saudi Data & Artificial Intelligence Authority (SDAIA), "State of AI in Saudi Arabia", GAIN Summit, 2024. <https://globalaisummit.org/Documents/StateofAlinSaudiArabia.pdf>
- ⁵⁵ Ibid.
- ⁵⁶ Tortoise Media, "The Global AI Index 2024", 2024. <https://www.tortoisemedia.com/intelligence/global-ai/>
- ⁵⁷ IMD World Competitiveness Center, "IMD Smart City Index 2024". https://issuu.com/docs/e7a60c053affbf9e98fcb93afe857af?fr=xKAE9_zU1NQ
- ⁵⁸ SDAIA, "The State of AI in Saudi Arabia".
- ⁵⁹ Access Now, "Bad for human rights and for business: Amazon must not build cloud infrastructure in Saudi Arabia", May 6, 2024. <https://www.accessnow.org/press-release/aws-must-not-build-cloud-infrastructure-in-saudi-arabia/>
- ⁶⁰ Mavis Tsai and Jerry Chen, "Alat fund of Saudi Arabia poised to cut China ties for US chips and AI", DigiTimes Asia, May 9, 2024. <https://www.digitimes.com/news/a20240509PD208/saudi-arabia-ai-chips-china-us-chip-restrictions.html>
- ⁶¹ Aubra Anthony, Lakshmee Sharma, and Elina Noor, "Advancing a More Global Agenda for Trustworthy Artificial Intelligence", Carnegie Endowment for International Peace, April 30, 2024. <https://carnegieendowment.org/research/2024/04/advancing-a-more-global-agenda-for-trustworthy-artificial-intelligence?lang=en>
- ⁶² See also: Heather Conley, et.al., "Alliances in a Shifting Global Order: Rethinking Transatlantic Engagement with Global Swing States", German Marshall Fund of the United States, May 2023. https://www.gmfus.org/sites/default/files/2023-04/Global%20Swing%20States_27%20apr_FINAL_embargoed%20until%20%20May%202023.pdf
- ⁶³ Insights for this recommendation and recommendation 4 come from interviews, chapter research, and the following sources: Simone Tagliapietra and Cecilia Trasi, "Making the most of the new EU Clean Trade and Investment Partnerships", Bruegel, October 16, 2024. <https://www.bruegel.org/first-glance/making-most-new-eu-clean-trade-and-investment-partnerships>; Fanny Sauvignon and Stefania Benaglia, "An EU global gateway ... to what?", Centre for European Policy Studies, November 27, 2023. <https://www.ceps.eu/ceps-publications/an-eu-global-gateway-to-what/>; Chrisitan Dietz and Christian Engenhofer, "Aligning the Global Gateway Around 'Resilience' Could Give It A New Lease On Life", Centre for European Policy Studies, October 2024. https://cdn.ceps.eu/wp-content/uploads/2024/10/2030-09_ERCC-2.pdf; Bruno Theodoro Luciano and Carmen Fonseca, "EU-Brazil Relations: Opportunities and Challenges from the Global Gateway and the Amazon Fund Initiatives", United Nations University, Policy Brief No. 08, 2024. https://cris.unu.edu/sites/cris.unu.edu/files/UNU-CRIS_Policy-Brief_2408_Luciano-and-Fonseca_0.pdf

Disclaimer

The views expressed in GMF publications and commentary are the views of the author(s) alone.

As a nonpartisan and independent research institution, the German Marshall Fund of the United States is committed to research integrity and transparency.

Acknowledgments

The authors thank their interviewees for sharing their insights into the topics of the report. They also express their gratitude to their peer reviewers, namely Aziz Alghashian, Lindsay Gorman, Sharinee L. Jagtiani, Garima Mohan, Sameer Patil, Martin Quencez, and Astrid Ziebarth. A special thank you goes to Hortense Pelletan for her extensive background research during the preparation phase of the research.

Subigya Basnet and Benazir Baig led the layout and graphic design. Project leads were Martin Quencez, Rachel Tausendfreund, and Gesine Weber.

This publication was made possible thanks to the generous support of the Ministry of Foreign Affairs of the Netherlands.

About GMF

The German Marshall Fund of the United States (GMF) is a nonpartisan, nonprofit, transatlantic organization headquartered in Washington, DC, with offices in Ankara, Belgrade, Berlin, Brussels, Bucharest, Paris, and Warsaw.

GMF strives to champion democratic values and the transatlantic alliance by strengthening civil society, forging bold and innovative policy ideas, and developing a new generation of leaders to tackle global challenges. GMF delivers hope by upholding the dignity of the individual and defending freedom in the spirit of the Marshall Plan.



Ministry of Foreign Affairs

Ankara • Belgrade • Berlin • Brussels • Bucharest
Paris • Warsaw • Washington, DC

gmfus.org