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The Netherlands, Europe and the Global South in a changing world order

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The Netherlands, Europe and the Global South in a changing world order

Advisory Report | 10 September 2025







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Advisory Council on International Affairs

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Executive Summary

The rapid geopolitical shifts currently taking place require a repositioning of Europe and the Netherlands in the world. In this advisory report, the Advisory Council on International Affairs (AIV) calls for the expansion and strategic deepening of relations with countries in the Global South. This is essential not only to help shape a multipolar world and avoid adverse geopolitical scenarios, but also to respond to the economic rise of the Global South and to pursue common interests through effective multilateral cooperation.

Such repositioning provides guidance at a time of increasing geopolitical uncertainty. As a relatively small country with an open economy, the Netherlands depends on international markets, trade relations, access to raw materials and a stable international legal order. In a world where traditional alliances are under pressure, our prosperity, security and influence depend on forging new connections.

Cooperation with the Global South — a diverse group of countries including India, Indonesia, Brazil, South Africa, Nigeria and dozens of medium and small-sized states — is indispensable to counter undesirable geopolitical developments. Russia and China have rapidly expanded their influence in the Global South, including in resource-rich and fragile states. China exercises its influence mainly through trade and investments, while Russia has secured a foothold in various conflict zones, through the provision of military support. Europe will have to step up its engagement to avoid loss of relevance, influence and prestige.

The new course pursued by the United States (US) under Trump's second presidency has reinforced the urgency. Erratic US trade policy, with little regard for international rules and the country's withdrawal from the Paris Agreement and the World Health Organisation (WHO), have dealt heavy blows to the multilateral system. This undermines the collective ability to take on global challenges such as climate change and pandemic preparedness. Moreover, geopolitics may be moving towards a scenario in which Europe and the Global South are caught between the rival superpowers, the US and China.

Against this backdrop, the long-term interests of Europe and countries in the Global South are becoming more closely aligned. Forging stronger ties with these countries reduces the likelihood of the undesirable geopolitical superpower scenario, while allowing for progress towards a multipolar order in which the international rule of law is strengthened and multilateral solutions can thrive. There is broad support for these principles in the Global South, as evidenced by the active role many southern countries played in the creation and adoption of the Pact for the Future in 2024. Moreover, many southern countries also see Europe as an attractive partner, thanks in part to its large internal market.

Closer relations with the Global South are also of economic importance to Europe. With a growing share of the global population and economy, these countries are increasingly important as markets for Dutch companies. They also play a crucial role in terms of access to raw materials, energy, labour and technology. Strengthening Europe's strategic autonomy requires large-scale investments in the green and digital transitions and the defence industry. These ambitions can only be achieved through strategic cooperation with and investments in countries in the Global South, partly because of the need for critical raw materials.

A strategic deepening of relationships, however, will require a fundamental shift in the European attitude towards the Global South, aimed at bridging differences. For although long-term interests may coincide in principle, priorities and views about what to do often diverge. Amid the current geopolitical turbulence, many European countries cling to preserving the liberal world order of the past decades, while countries in the Global South are instead emphasising the need for thorough reform. Countries such as India, Brazil and South Africa have long been voicing criticism that the current world order offers them too little influence and fails to serve their interests adequately.

Moreover, they observe double standards in the application of the values and rules that the liberal world order claims to uphold. This criticism intensified during the coronavirus pandemic, when European countries proved very reluctant to share vaccines with other countries, and more recently in light of the differing responses to the wars in Ukraine and Gaza. Europe's criticism of other countries over human rights violations or relations with Russia, while at the same time tolerating Israeli aggression in Gaza, has damaged Europe's credibility as a partner. Indian foreign minister Jaishankar struck a chord with many with his remark at the start of the Ukraine war: *"Europe has to grow out of the mindset that its problems are the world's problems, but the world's problems are not Europe's problems."*

Criticism of Europe from the Global South may at times seem unfair, for instance because many of the problems these countries experience are also linked to shortcomings in their own policies and governance. Moreover, revisionist forces use disinformation to further stoke anti-European sentiment. While unjustified criticism must be countered, Europe must also acknowledge that some of it is legitimate. That calls for a constructive attitude and willingness to embrace southern proposals for reform that contribute to a fair, peaceful and sustainable world.

The confluence of the rise of the Global South and the declining relative influence of Europe in the world could offer opportunities for a more equal relationship. In doing so, Europe need not shy away from putting its own interests, views and dilemmas on the table. In fact, that is a prerequisite for equal cooperation, as long as it is the starting point for an honest and respectful dialogue, focused on shared or complementary interests. Europe could make a difference, for instance, by proactively promoting southern ambitions for industrialisation and local processing of raw materials, thereby simultaneously reducing Europe's own dependence on China.

Too often, however, European actors continue to perceive non-western societies through an implicit sense of superiority, consciously or unconsciously using European models of liberal democracy and free markets as the benchmark. It is time to relinquish this approach, if only because Europe itself is increasingly confronted with internal challenges and dissatisfaction among broad segments of its population. Moreover, such an approach is not a fruitful basis for constructive relations with southern countries who want to be treated as equal partners with their own realities and dynamics.

At the same time, Europe must safeguard its core values. Where international law is at stake, Europe must take a clear stand and remain true to itself. Restructuring global relations also requires a stronger commitment to the international rule of law and reform of international institutions. Consistency is essential in this process. Yet defending core values and drawing red lines is not the same as publicly criticising potential partners for every shortcoming or difference of opinion, which is generally counterproductive. Europe must show strong commitment to its own values, without giving the impression of seeking to impose them on others.

Genuinely equal partnership demands an open dialogue about each other's interests, but must go beyond a transactional exchange of short-term interests, especially given the historically rooted power imbalances and unequal starting positions. Moreover, Europe's colonial history also brings

special responsibility for today's global problems, such as inequality and climate change. In the here and now, Europe must therefore be prepared to compromise and invest.

For example, Europe should be prepared to yield some of its voting power in multilateral institutions, in favour of countries from the Global South. Active support is also needed for financial reforms that may increase the availability of capital for much-needed investments in the Global South, including in public infrastructure and climate adaptation. Without tangible progress in these areas, the multilateral system will lose legitimacy in the Global South, while alternatives, such as those proposed by BRICS, will gain further appeal. This is not in Europe's interest.

At the same time, the current chaotic geopolitical context offers little room for a large-scale multilateral overhaul. This is not a new 'Bretton Woods moment'. It is therefore important that the Netherlands, alongside efforts towards high-level reform, also invests in flexible and pragmatic coalitions to make progress on specific issues, such as combating tax evasion, improved access to capital markets and solutions to the debt problem facing countries in the Global South. The Netherlands and other European member states will also have to show credibility by honouring previous agreements on climate and development finance.

As described in detail in this report, there is a high degree of diversity within the Global South. Besides the emerging powers, it also includes a large number of developing countries, particularly in Africa, that are still lagging behind and continue to struggle with poverty, fragility and weak governance. It makes sense for European actors to take great interest in strengthening relations with large emerging economies and powerful influential middle powers. However, the AIV emphasises that the poorer and more fragile areas must not be neglected. Instability in those regions also affects the Netherlands, in areas such as security and migration. Moreover, in the current context, it may even be particularly effective to cooperate through minilateral coalitions, involving various types of countries. For instance, the Netherlands could collaborate with emerging Asian economies to help strengthen mutually important sectors in poorer countries, such as the ICT sector and digital hardware manufacturing.

As for the EU, better alignment and coordination is essential, both among the various Directorates-General (DGs) within the European Commission, and between member states and the Commission. Additional efforts are needed to engage the private sector and ensure its involvement in geo-economic initiatives in the Global South, for example through better financing mechanisms. Without such engagement, initiatives like the Global Gateway risk remaining empty shells. The Netherlands should also more explicitly seek cooperation with like-minded member states such as Germany and the Nordic countries, to better coordinate engagements with countries in the Global South. In specific cases, such as the Sahel, the Netherlands could play a bridging role between different EU member states.

Finally, knowledge and networks are crucial prerequisites for deeper and more effective partnerships. Cuts to knowledge institutions, diplomatic missions and cultural and academic exchange programmes with the Global South run counter to the need for strong personal connections and mutual trust and understanding. Precisely these elements are essential for international partnerships to take root and flourish.

To actively pursue the southern partnerships that are urgently needed in the current era, the AIV makes the following recommendations.

Recommendations

General

1

Commit to reorienting relations with countries in the Global South: focus on expanding and deepening strategic partnerships based on equality and mutual long-term interests. Recognise that, in the shorter term, this will require concessions and investments from the European side.

- Clearly communicate, at home and abroad, that strengthening relations with countries in the Global South is essential to serve Dutch and European interests in a changing world order.
- Put equality into practice by being transparent about self-interest and taking the interests of others seriously, but also by acknowledging unequal starting positions and Europe's historical responsibility in this regard. This requires sharing wealth and power and letting go of notions of western superiority.

2

Help shape the multipolar 'à la carte' world by actively cooperating with countries in the Global South, grounded in shared commitment to the international legal order, thereby avoiding the scenario of a global order dominated by US-China rivalry.

- A stronger connection between Europe and countries in the Global South reduces the scope for the US or China to pressure countries into binary choices or decoupling from the other major power.
- Maintain dialogue with partners such as Brazil, India and South Africa about Russia's destructive role in Ukraine, without coercing them to follow the European line.

Multilateral

3

Seek more active cooperation with southern countries to reform multilateral organisations, as renewed anchors to address global challenges, strengthen the international legal order and promote development. Simultaneously, also engage in targeted collaboration to maintain momentum on key issues, such as trade, taxation and debt.

- Acknowledge that reform is necessary for the survival of institutions such as the UN, WTO, IMF and World Bank, which are under pressure due to the dismissive stance of the US and underrepresentation of southern countries.
- Express active support for permanent seats in the UN Security Council for India, Brazil and two African countries, and work towards building consensus on coordinated European representation.
- Embrace southern proposals, such as the Bridgetown Initiative, for reforming the World Bank and IMF, the issuance of additional Special Drawing Rights (SDRs) through development banks, debt relief, and the Brazilian tax reform proposal - including by systematically placing these issues on the EU agenda.
- Participate more actively in initiatives by organisations that are valued in the Global South, such as UNCTAD, the African Union and regional development banks.

European Union

4

Actively contribute to the positioning of the EU as a constructive player in the multipolar order, creating the conditions for equal cooperation with the Global South.

- Strive for more and better trade agreements with countries in the Global South, such as Mercosur, and ensure that these agreements leave both sides with sufficient policy space to actively shape sustainable and fair economic development, giving priority to South Asia and Southeast Asia.
- Consistently advocate in Brussels for a more constructive attitude towards the Global South. The EU now often falls short in initiating timely and equal dialogues about European policies that may have negative effects on countries in the South, such as sustainability standards or the Carbon Border Adjustment Mechanism (CBAM).
- Coordinate as much as possible through a joint Team Europe approach in engagements with major centres of power within the Global South, such as India and Brazil.

5

Strengthen commitment to the Global South's ambitions for industrialisation and job creation through targeted support to industrial clusters and infrastructure, in line with mutual priorities.

- Promote green industrial partnerships that focus on increased local value addition and employment. This can help reduce migration pressure and improve European access to raw materials via intermediate goods (semi-finished goods).
- Enhance the coherence between initiatives such as the Global Gateway, Critical Raw Material Partnerships and Clean Trade and Investment Partnerships, ensuring that they structurally contribute to the effective implementation of the industrial policies of partner countries.
- Improve the alignment between the EU's political ambitions on the global stage and the European private sector, including by better coordinating export credit guarantees and development finance, to enable coherent financing of strategic investments in the Global South.

The Netherlands

6

Identify a number of key partners in the Global South with whom to strengthen relations across the board, grounded in equality and a shared vision of the future.

- Take into account criteria such as respect for human rights, international law and democratic principles, as well as historical ties, trade flows, geographic proximity and shared challenges. The 14 'combination countries' mentioned in Dutch foreign policy, such as Senegal, Nigeria, Ghana, India, Colombia and Bangladesh, offer a good starting point.
- Upgrade relations with the selected countries, moving beyond the usual combination of trade and sustainable development and provide embassies with the resources and scope to flexibly support local leaders in government, civil society and business, in a way that aligns with their priorities.
- Encourage the various Dutch ministries, civil society and private sector actors to invest in building relationships with relevant counterparts in the selected countries.

7

Be consistent in delivering on development and climate finance commitments, in line with the SDG agenda, focusing on the least-developed countries and fragile states, partly in the interest of international security and stability. Adopt a country-focused approach through initiatives that address specific challenges, with a mix of European and southern partners.

- Seek collaboration with like-minded countries such as Germany, the UK and Scandinavian countries, to ensure a coherent approach in the least-developed and fragile states.
- Ensure that Dutch ministries and embassies preserve expertise on fragile contexts and pursue an integrated approach combining defence, diplomacy and development cooperation.
- Explore the possibility of an inclusive North-South commission at the international level to consider the future of development cooperation, focusing especially on the least-developed and fragile states.
- Take the lead in developing innovative cooperation models (North-South-South) by partnering with countries from Recommendation 6, or emerging economies such as India or the Gulf States. Explore minilateral coalitions with such countries, to support post-conflict reconstruction, or to facilitate key transitions in least-developed countries, in areas such as energy, food or digitalisation.

Preconditions

8

Ensure a solid and updated knowledge base on the Global South and strengthened networks through universities, think tanks, embassies and academic and cultural mutual exchange programmes.

- Timely identification of key developments will help prevent missteps and seize opportunities. Therefore, invest in knowledge of various regions (history, language, society) at universities and think tanks. The absence of a European think tank focused on South Asia should be addressed.
- Expand the network of Dutch diplomatic missions in the Global South, instead of scaling it down.
- Invest in exchange programmes and scholarships. Budget cuts in this area come at a high cost, as the Netherlands would lose valuable knowledge, networks and soft power.
- Work with other EU member states to improve the application process for short-stay Schengen visa, aiming for faster turnaround times and more transparency to applicants.

9

Actively promote values such as individual freedoms and democracy, without imposing them. Regardless of the country in question, be firm on red lines concerning violations of international law.

- Stay committed to themes such as democratisation, civic space and individual freedoms, which is widely appreciated by populations in the Global South.
- At the same time, be open about the necessity of cooperating with governments that do not fully share these values or interpret them differently.
- Be consistent in responses to violations of international law, thereby avoiding the accusation of applying double standards.

10

Communicate more strategically: move away from an often unconscious attitude of superiority and avoid fuelling anti-European narratives. Also invest in proactive social media communication to counter disinformation campaigns originating from Russia, the US, China and other actors.

- Pay special attention to the colonial past and how it continues to influence the present. Keep developing initiatives related to this history with relevant countries and communities, both abroad and at home. In recent years, the Netherlands has made a good start in this regard.
- In light of colonial and postcolonial history, adopting a careful tone and approach to communication is essential. Differences of opinion can and should be expressed, but Europe must avoid imposing agendas. Anti-European actors are adept at framing such tendencies as neocolonialism.
- Invest, at the European level, in active information campaigns on social media, including in local languages, aimed at communicating a clear European vision for global prosperity, and to counter the spread of disinformation.



Mumbai, one of the fastest-growing cities in the Global South, illustrates how countries like India are rapidly emerging as significant economic and political players. Through large-scale investments in infrastructure, technology and urban development, India is strengthening its role as a global hub. At the same time, it is actively positioning itself as a representative of the Global South, calling for greater influence and equality in global decision-making. This rise signals a world in transition, in which the West is losing its dominant position. For Europe, this implies the need to reposition itself within a multipolar world order, with a focus on reciprocity and partnership.

The rise of the Global South?

The world is always in flux, but the pace of change varies. Over the past 30 years, developments seem to have accelerated. Whereas in 1995 the world was dominated by Europe, North America and Japan (the West) in just about all areas, the balance has since shifted. Within a short period of time, China has become an economic and technological powerhouse. The influence of other countries in ‘the Global South’, such as India, Indonesia, Brazil and the Gulf States, has also increased significantly.

This has prompted the Advisory Council on International Affairs (AIV) to examine Dutch and European policy towards the Global South in this advisory report. Europe’s relations with countries in the South go back a long time and have undergone several transformations, from colonialism to partnerships in development cooperation and trade. Yet in broader foreign policy, these countries still come second or third, after traditional western allies. Against the backdrop of the geopolitical shifts currently taking place, the question arises whether the relationship is poised for a new transformation. The main question of this report, then, is: *how should the Netherlands and Europe reposition themselves in relation to the diverse countries of the Global South, given the changing world order?*

This question immediately raises a follow-up one on what exactly is meant by ‘the Global South’. This chapter first discusses the usage of this term and then examines to what extent - and in what domains – one could speak of the rise of the Global South.

1.1 What’s in a name: the Global South

There is no clear-cut definition of ‘the Global South’, but in general the term refers to most countries in Central and South America, Africa and Asia, except for Japan and South Korea, which are considered part of the West. A useful reference point is the group of G77 countries, founded in 1964 as a coalition for joint advocacy of developing countries within the United Nations (UN), which currently has over 130 members. While China is not formally a member, it is closely involved with the group, often referred to as ‘G77+China’.¹ Russia is not a member of the group. In this report, the AIV uses the term Global South to refer to G77 members, supplemented by the three Central Asian republics not included in that group: Kazakhstan, Kyrgyzstan and Uzbekistan.

There is clearly a high degree of diversity within this group. In many ways, the differences among countries in the Global South are greater than the similarities. The Sahel countries and Gulf states, for example, are at opposite ends of the global ranking of countries by per capita income.

Political systems also vary widely, from a large number of multi-party democracies to military juntas in the Sahel and authoritarian regimes such as Iran. Although political cooperation is increasing, such as through the BRICS, this does not mean these countries form geopolitical or geographic blocs. Take India, which positions itself as a leader of the Global South. At the same time, the dominant logic of India's foreign policy is shaped by regional dynamics, particularly its rivalry with Pakistan and China, both of which also identify as part of the Global South. Nevertheless, India shares membership with both states in the Shanghai Cooperation Organisation (SCO) and with China in the BRICS.

Some experts are critical of the term Global South, due to these internal differences.² Furthermore, the term can also be politically instrumentalised, for instance by framing 'the Global South' as united in criticism of the hypocritical western global order. This narrative is regularly deployed in a polarising manner by certain leaders seeking to stir anti-western sentiment and bolster their own domestic position and legitimacy. Russia has also used the term 'Global Majority', for instance in Foreign Minister Lavrov's 2023 speech to the UN General Assembly, where he claimed that the global anti-colonial majority has had enough of the western yoke.³

Azerbaijan provides another recent example. The Baku Initiative Group, formed in 2023, has focused on fuelling anti-French sentiment in former colonies and overseas territories like New Caledonia and Mayotte.⁴ This cannot be viewed separately from France's support for Armenia in the conflict with Azerbaijan. During the COP29 climate change conference in Baku, President Aliyev used his position as host to lash out at France and the Netherlands at an event focused on small island states, accusing the two countries of neo-colonialism and oppression in overseas Caribbean and Pacific territories.⁵

Another form of misuse of the Global South frame occurs when elites in developing countries hide behind anti-western rhetoric to deflect from their own failure to achieve inclusive development. Venezuelan President Maduro, for example, blames western imperialism for his country's deep economic crisis and presents 'South-South cooperation' as the way forward to break western hegemony.⁶

Despite these drawbacks, however, there are also strong arguments in favour of using the term Global South. First, it is widely used in the countries it refers to, by politicians, analysts and activists. Especially given the colonial past, Europe should exercise some restraint in criticising the way these countries refer to themselves.⁷

Furthermore, the term does offer analytical value as long as one is aware of the pitfalls. Many of these countries share a colonial past, often with European powers, and that legacy still influences their attitude towards the West. Economically speaking, most are low or middle income countries occupying, with some exceptions, similar positions in the international economic order.⁸

What binds them above all is their shared ambition to reform the current international order, aiming for a more inclusive system that is better aligned with their interests and concerns. The term is particularly useful because many global issues today are divided along North-South lines – such as debates on the reform of multilateral institutions, international taxation, the distribution of costs and benefits of climate policy and perceptions of double standards. Such divisions, which will be explored further in Chapter 3, make the 'Global South' a useful term for describing and understanding global power dynamics.

1.2 Shifts in focus

Since the turn of the century, there has been frequent talk of ‘the rise of the Global South’. But what do the numbers actually show? In which areas is this rise indeed evident – and where is it not? And is this rise largely attributable to just a few countries or is it a broader phenomenon? The AIV reviews several areas.

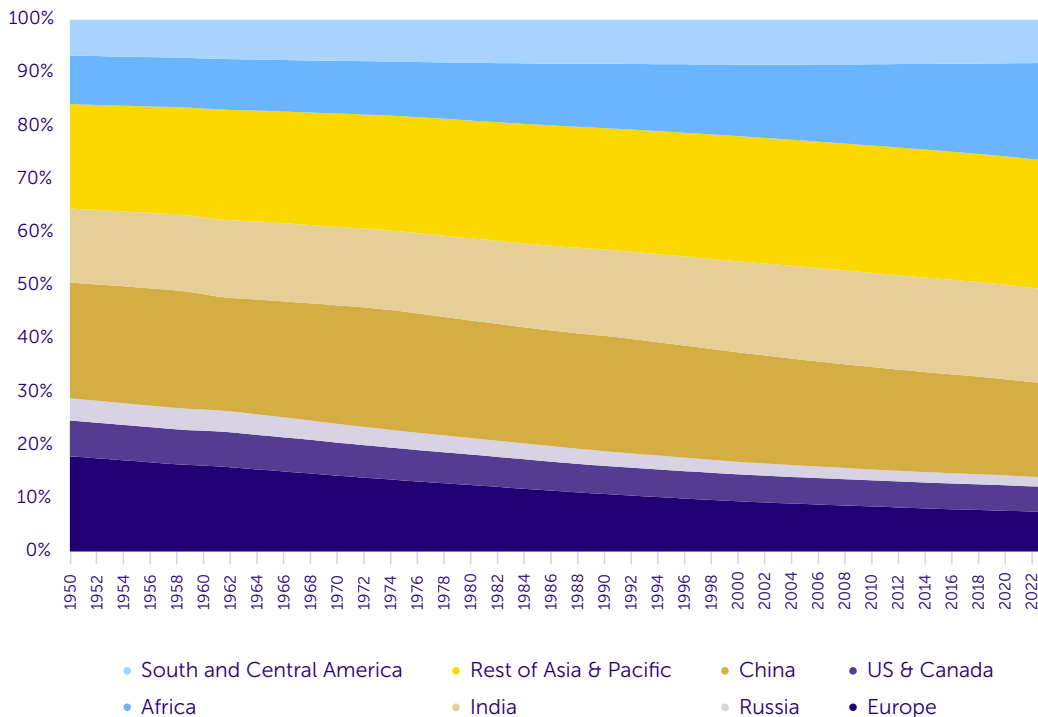
Demography

In demographic terms, ‘rise’ is not quite the right term, because even in 1950, the countries of the South accounted for around 70% of the world’s population (see Figure 1). Since then, this share has increased even further, to well over 80%. This growth has primarily come at the expense of Europe’s share, which declined from 17.9% in 1950 to just 7.4% in 2023.

There are significant differences within the Global South. China’s share of the global population has declined slightly, while India’s has increased. Together, these two countries have accounted for about 35% of the world’s population since 1950. The fastest population growth occurred in the rest of Asia and especially in Africa, where the population increased from less than 250 million in 1950 to nearly 1.5 billion today, doubling its share of the global population from 9% to 18%.

Figure 1. World population, 1950-2023.

The figure shows the evolution of relative population shares per world region from 1950 to 2023, illustrating that Europe’s share of the global population is shrinking, while that of the Global South is increasing.



Source: AIV, based on UN World Population Prospects (2024), via Our World in Data.

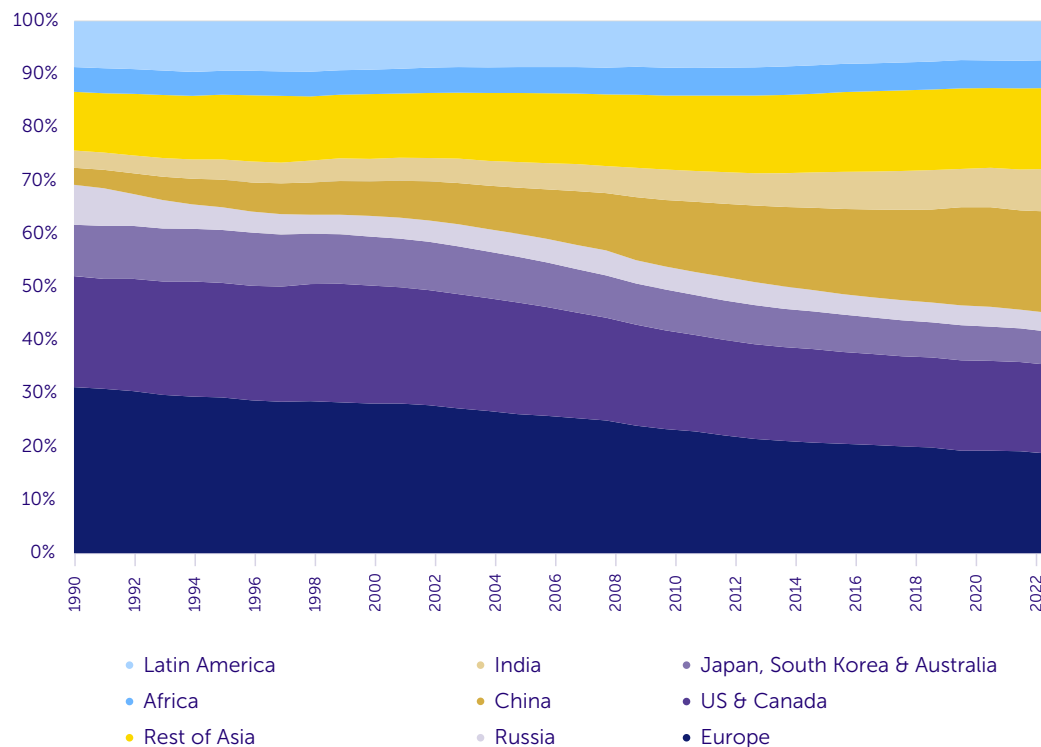
Looking ahead to 2050, based on the latest UN projections⁹, three broad demographic trends emerge. In Europe, Russia and East Asia, the population will decline in absolute terms, with Europe's share likely to fall below 6%. In many Latin American and Asian countries - including Brazil, India and Indonesia - population growth is expected to slow, moving towards demographic stabilisation. The only region with sustained growth is Africa, where the population could reach 2.5 billion by 2050. Almost half of this growth is expected to take place in Nigeria, Democratic Republic of Congo (DRC), Ethiopia and Tanzania. In African countries where birth rates have started to come down, such as Kenya and Ghana, a demographic dividend may emerge in the coming decades as the share of the working-age population will grow. This offers opportunities for accelerated economic growth, provided that sufficient investments are made in education and employment.

Economic growth

For much of the 20th century, the global economy was dominated by the West. In 1990, this group - comprising Europe, the United States, Canada, Japan, South Korea and Australia - accounted for 62% of the world economy, even after adjusting for higher price levels in wealthy countries (Figure 2). In nominal dollar terms, their share was even higher. Since then, the global economic balance of power has shifted significantly, mainly due to China's rapid growth. The share of the West fell to 42%, while China's share (measured in purchasing power parity) rose from 3% to 19%. Other emerging markets have also grown rapidly since the late 1990s. In 2001, a Goldman Sachs investment banker coined the term BRIC (Brazil, Russia, India and China), which was later expanded to BRICS with the inclusion of South Africa.

Figure 2. World gross domestic product, in purchasing power parity, 1990-2023.

The figure shows the evolution of the relative economic share of different world regions, with a marked increase in the share of China and India and a decline in the western share.



Source: AIV, based on World Bank data (2025), via Our World in Data.

Figure 2, however, shows that the economic rise of the Global South is largely driven by China and India. The share of the rest of the Global South increased only modestly, from 24.3% in 1990 to 27.7% in 2023. Table 1 confirms this picture by looking at GDP per capita as a percentage of the Dutch level, adjusted for price differentials. Economic rise should, in principle, involve a process a catching up. This is clearly visible for China, India and Southeast Asia, although the differences remain large: India, for example, is still at 14% of the Dutch level and in nominal dollar terms, at only 6%.

Other southern regions such as Latin America, the Middle East and Africa have actually fallen further behind since 1990. The temporary economic boost during the commodity boom of 2003-2013 did not lead to structural transformation and many of these economies have since regressed.¹⁰ Large parts of the Global South, economically speaking, are therefore better described as lagging behind rather than emerging.

Table 1. GDP per capita as a percentage of the Netherlands, 1990 vs 2023.

The table shows that some parts of the Global South, particularly in Asia, are in the process of catching up economically with western countries such as the Netherlands, while countries in the Middle East and Africa are falling further behind.

Country / Region	GDP per capita as a percentage of Dutch GDP per capita	
	1990	2023
China	5%	32%
India	6%	14%
Southeast Asia (ASEAN-5)	17%	26%
Latin America	31%	28%
Middle East & Central Asia	29%	22%
Sub-Saharan Africa	9%	7%

Source: AIV, based on IMF data (2025): World Economic Outlook Database.

Financial Sector

The global financial system has traditionally been dominated by the West. Around the turn of the century, the US dollar accounted for some 70% of global foreign exchange reserves, followed by the euro at around 20%.¹¹ Since then, the dollar's share has fallen to 59%, partly due to increased use of smaller western currencies such as the Australian and Canadian dollars. The Chinese renminbi still plays a modest role (2-3%), while other southern currencies are considered too unstable to be reserve currencies and are also barely used for international transactions. Western dominance is also evident from the central role of SWIFT, the Belgium-based platform used by more than 11,000 banks in 200 countries to facilitate financial transactions.

This dependence on western currencies and institutions is a thorn in the side of the BRICS countries, especially after the West's decision to largely cut Russia off from the international payment system following its invasion of Ukraine. In response, BRICS countries have started exploring alternatives to increase their financial autonomy. The idea of a joint BRICS currency, mainly advocated by Russia, is considered unrealistic by most experts.¹² Moreover, the other BRICS countries do not seem particularly enthusiastic about it.¹³ There is growing interest, however, in conducting mutual trade using their own currencies, as India and Russia have already started doing.¹⁴ Over time, a further increase in trade flows among southern economies could thus contribute to a gradual decline in western dominance of the global financial system.

International Trade

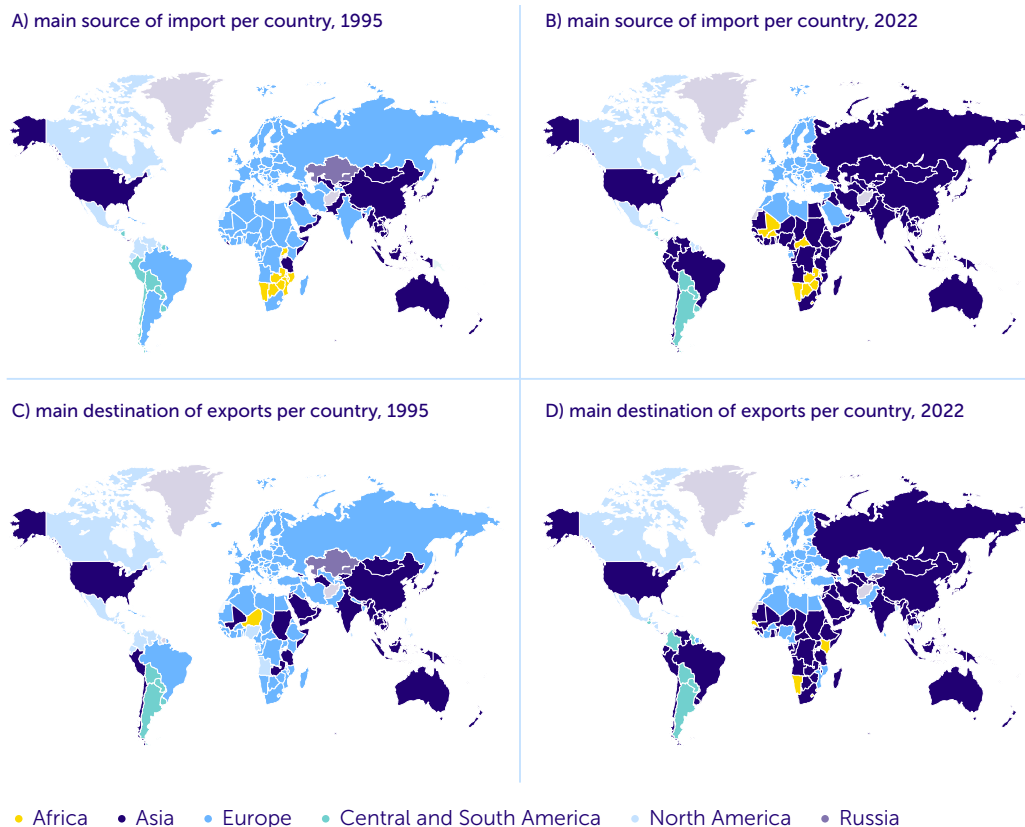
In the 19th and 20th centuries, world trade largely revolved around two axes: the export of raw materials from the Global South to the West in exchange for industrial products, and the exchange of goods among western countries. This pattern has changed in recent decades, with far-reaching economic and geopolitical consequences.

Figures 3a and 3b show, per country, which continent was the primary source of imports in 1995 and 2022. In 1995, Europe was still the largest supplier for many countries in the Global South, including Brazil, India and South Africa. At that time, no Latin American country primarily imported from Asia, and in Africa, only three countries did. By 2022, that picture had completely changed. The vast majority of countries worldwide now import mostly from Asia. The only markets where Europe continues to dominate are a few North African countries, Cuba, Gabon and Guinea-Bissau. This shift partly reflects the rapid industrialisation in Asia and the decline of manufacturing in Europe. While the transformation of the global economic map would appear less drastic if trade in services were included, the broader picture of Asia's rapid rise in world trade would still hold.

In terms of exports, the centre of gravity has also shifted, as shown in Figures 3c and 3d. In 1995, Europe was still the main export destination for many countries, especially in Africa and the Middle East. South America had a diverse profile, with Europe being Brazil's main export market. By 2022, Asia had become the dominant export destination for most countries in the Global South. Whereas in 1995 North America was the main export destination for oil exporters such as Angola, Nigeria and Venezuela, today it serves that role for only a handful of countries, mainly in Central America. With the increased import tariffs under Trump, expansion of that short list seems unlikely.

Figure 3. Main trading partner per country, 1995 vs 2022.

The figure shows how, between 1995 and 2022, Asia displaced Europe as the main trading partner for most of the countries in the Global South, both in terms of imports and exports.

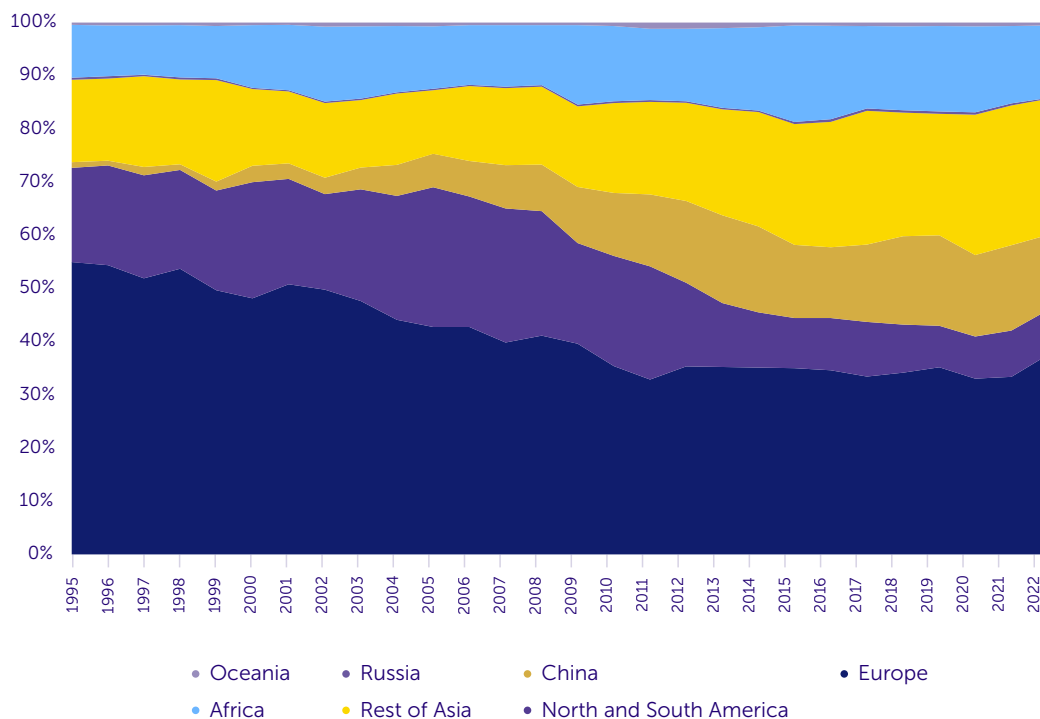


Source: AIV, based on UN COMTRADE data, via Atlas of Economic Complexity.

The world maps in Figure 3 clearly illustrate the extent of the trade shift. At the same time, they do not provide a complete picture, since the trade profile of most countries is quite mixed, while each country on the map is given only one colour. Figure 4 offers more detail on African exports, showing that Europe remains of great importance, with a 37.5% share. However, that is significantly lower than the 55% share in 1995. Moreover, North Africa accounts for half of all African exports to Europe; elsewhere on the continent, Asia is relatively more important. Around 2013, Asia overtook Europe as the main export market for the African continent as a whole. China plays a central role in this shift, through its mineral and oil imports, but other countries such as India (oil, gold, fertilisers and agricultural products) and the United Arab Emirates (mainly gold) are also key destinations. Some 65% of Africa’s exports to Asia go to countries other than China.

Figure 4. Destination of African exports, 1995-2022.

The figure shows that Asia has overtaken Europe as Africa’s main export destination over the past decade, but also that, despite its gradually declining share, Europe still remains a very important trading partner.



Source: AIV, based on UN COMTRADE data, via Atlas of Economic Complexity.

South-South relations are also gaining ground in terms of investments. China’s Belt and Road Initiative (BRI), launched in 2013, focuses on global investments in infrastructure and productive sectors. In the 2010s, the annual value hovered around \$100 billion. After a sharp decline between 2020 and 2022, the BRI funding tap has recently been fully reopened.¹⁵ Over the years, Southeast Asia, Africa and the Middle East have been the main destinations.

In addition, the Gulf States are stepping up their game. In 2022 and 2023, they announced \$113 billion worth of investments in Africa, more than in the entire previous decade.¹⁶ These include investments in infrastructure such as ports, as well as projects in oil, gas and renewable energy.

Raw Materials and Technology.

Economic production depends on raw materials and technology. In the 20th century, oil and gas were the most important natural resources. These reserves are fairly well distributed around the world, although the Middle East holds a disproportionately large share. In the 21st century, the green and digital transitions have shifted attention to a wide range of critical raw materials (CRMs). Batteries, for instance, require lithium, cobalt, manganese, nickel and graphite; rare earth elements are needed for wind turbines, while solar panels require silicon. Digital technologies rely on materials such as gallium, germanium, tantalum and tin. Both transitions also demand large amounts of copper.

Most of these raw materials are highly concentrated geographically. Western countries such as Canada, the US, Australia and Sweden have important reserves, but the bulk is located in the Global South. For example, 63% of the world's known cobalt reserves are found in DR Congo; 40% of copper reserves in Chile and Peru; 45% of manganese in Gabon and South Africa; and 40% of all nickel in Indonesia and the Philippines. Brazil holds more than 90% of known niobium reserves - a key material for the production of steel and semiconductors.

Some critical raw materials, such as tungsten, are predominantly found in China (83% of reserves). However, China's real dominance lies in the processing of critical raw materials, including cobalt, copper and manganese from Africa and South America. The refined products are partly used in China's domestic industries, but also exported to Europe. In addition, China controls virtually the entire supply chain of rare earth elements, such as dysprosium, neodymium and yttrium. Although these are not exceptionally scarce, China is the only country to have invested in large-scale extraction and processing.

Beyond raw materials, the Global South also holds significant potential for renewable energy. North Africa, for example, has highly favourable conditions for solar power: an abundance of sunlight hours, high solar intensity, low population density and plenty of available space, especially in desert regions.

Technology

Technological innovation is also shifting geographically. In 2007, 77% of all patent applications still came from the West (including Japan and South Korea), but that figure has now dropped to less than 50%.¹⁷ This decline is almost entirely due to the explosive growth in Chinese applications, which now account for 47% of the global total – more than three times as many as the US, the number two. The launch of the AI model DeepSeek in February 2025 shows that China is also rapidly catching up in the field of advanced artificial intelligence.

India currently accounts for just 2% of patent applications, but that may change quickly. Each year, 2.5 million Indian students graduate in STEM disciplines (science, technology, engineering and mathematics). That is fewer than in China (3.5 million), but twice as many as in the US, France and Germany combined.¹⁸ Western countries are increasingly dependent on Indian knowledge workers. Germany aims to attract 90,000 Indian scientists per year.¹⁹ In the Netherlands, the number of Indian knowledge migrants tripled between 2015 and 2023, reaching 25,000.²⁰

Other emerging countries such as Indonesia, Brazil and Mexico are already producing more STEM graduates than France or Germany. At the same time, large parts of the Global South still lag far behind. In 2023, the Netherlands filed six times as many patent applications as the whole of Africa. That does not mean there is no technological progress. East Africa, for instance, has been a pioneer in digital financial innovation: M-Pesa, launched in Kenya in 2007, was the first successful mobile payments platform in the world.

International Politics

The power structures of multilateral institutions still offer limited space for emerging countries in the Global South. The veto powers in the UN Security Council remain the same as when it was created after World War II. Although the IMF and the World Bank have seen some redistribution of voting rights since 2010, rich countries remain dominant. For instance, the United States has an effective veto position in the IMF, as major decisions require an 85% majority, while the US holds 16.5% of the votes.

More movement is visible in smaller, more flexible cooperation frameworks. In the 1990s, the broad outlines for international decision-making were set through the G7 (between 1997 and 2014 the G8, including Russia). Today, the G20 has become more important, with more substantial representation from the Global South. This platform was established in 1999 for consultation among finance ministers, but was scaled up to the level of heads of government starting in 2008, during the financial crisis. Through the G20, countries such as India, Brazil, South Africa, Argentina and Saudi Arabia now have greater influence on the international policy agenda than before.

The BRICS is another example of shifting power relations. This forum started in 2009 with four countries, welcomed South Africa in 2011 and expanded to include Egypt, Ethiopia, Iran, UAE and Indonesia in 2024. In addition, a new category of 'BRICS partners' has been introduced, allowing countries such as Kazakhstan, Nigeria and Thailand, which are not full members, to participate in BRICS initiatives.²¹

The Organisation for Economic Co-operation and Development (OECD), founded in 1961, has traditionally been a forum for cooperation among mostly western countries, but is now increasingly engaging with the Global South. Chile's accession in 2010 was followed by Colombia (2020) and Costa Rica (2021). Talks are currently ongoing with Argentina, Brazil, Indonesia, Peru and Thailand, among other countries.

International Rule of Law and Security

Between 1990 and 2020, several military interventions took place in the Global South, initiated and carried out by western coalitions, such as in Afghanistan, Iraq and Libya. For a variety of reasons, such operations now appear less likely in the future.

Western contributions to UN peacekeeping missions have also declined sharply. About 34,000 western peacekeeping troops were active at the end of 1993, nearly half of the total. By 2025, this number has dropped to only 5,400, out of a total of over 61,000. Most peacekeepers now come from the Global South, with Nepal, Rwanda, Bangladesh and India together accounting for 37% of the total.²²

Beyond military engagement, European involvement in conflict resolution in the Global South has declined in general. In the 1990s, European governments actively invested in peace processes, such as in Angola, Mozambique, Aceh (Indonesia) and Colombia. In recent conflicts - in Syria, Sudan, Ethiopia and DR Congo - European efforts have been much more limited.

The era in which the West played a central role in nearly all political and security matters worldwide seems to be over. What will take its place remains uncertain. It is likely that regional powers will increasingly intervene in conflicts, such as the UAE in Sudan, or Rwanda in eastern Congo. At the same time, there is growing space for diplomatic initiatives from emerging players, such as Qatar, which is mediating in several conflicts in the Middle East and Africa.

Culture

At the end of the 20th century, the global cultural and entertainment landscape was dominated by the West. Across the world, people regularly watched Hollywood films, listened to western artists or watched English, Spanish or Italian football matches. The global cultural influence of the West

remains immense even today. For example, it is estimated that more than 3 billion people follow the English Premier League in some form.

Yet even here, major changes are underway. Indian films, through Bollywood and other studios, are rapidly expanding their audience in other Asian countries. The same is true for Nigerian Nollywood films in Africa and Turkish soap operas, which are popular from the Middle East to Latin America.²³ Meanwhile, K-pop and Afrobeats artists regularly top the global music charts and fill stadiums on international tours. East Asian developers are occupying an increasingly prominent position within the video game sector.²⁴ The importance of this industry is easily underestimated, but today over 3 billion people occasionally play video games, generating revenue four times greater than the entire film industry.²⁵ Moreover, the cultural influence of games is significant, as users tend to spend far more time on a single game than on an individual film.

Cultural influence is increasingly being used strategically as an instrument of soft power in the global struggle for power and legitimacy. Through media, art, language and traditions, states try to make their standards, values and worldviews appealing to foreign audiences. Religion also plays a growing role. In countries like Russia, India and parts of the Middle East, religion is used not only for domestic identity politics, but also as a tool to project influence across borders.

1.3 Conclusion

The title of this chapter ends with a question mark for a reason. There are caveats to be made regarding both the 'rise' and the 'Global South'.

Starting with the latter, the enormous diversity within the Global South, both between and within countries, is undeniable. Yet there are historical, political and economic factors that bind this large group of countries together, especially a shared desire to reform the international order in fundamental ways.

As for the 'rise', this chapter has discussed far-reaching changes in key areas. International dynamics have changed significantly compared to thirty years ago, mainly due to Asia's rapid economic and technological growth. This rise does not necessarily imply an absolute economic decline of the West or Europe, but it does herald a realignment of relative political influence.

However, there is also great variation in the extent of this 'rise' within the Global South. Much of the change is driven by China, but other middle powers such as India, Indonesia, South Africa, the Gulf States and Brazil are also gaining influence. At the same time, a significant group of countries continues to lag behind, trapped in poverty and fragility.

In short, the phrase 'rise of the Global South' requires some nuance, but remains an appropriate characterisation of a structural trend. The next chapter explores Europe's dependencies on the Global South as a result of this development, followed by an analysis of the geopolitical context in which Europe will have to manage these.



Chinese instructor and Kenyan trainee at the railway line between Mombasa and Nairobi. This line is one of the largest infrastructure projects in East Africa and part of the Belt and Road Initiative. Through such investments, China is expanding its economic and diplomatic presence in the Global South, opening up new trade routes and strengthening bilateral relations. The scale, visibility and strategic nature of these projects illustrate the shifting geopolitical dynamics, in which Europe too is experiencing growing competition. This calls for a renewed European effort to strengthen visibility, trust and strategic cooperation with countries in Africa, Asia and Latin America.



Europe and the Global South in a changing world order

The structural trends outlined in the previous chapter make it clear that developments in the Global South have an increasing impact on the Netherlands, Europe and the world. This chapter first explores Europe's growing dependencies on the Global South and subsequently places them in the context of the current geopolitical turbulence. Possible scenarios are presented, and their implications for Europe's approach to the Global South are analysed.

2.1 Dependencies on the South

Europe's dependence on the Global South manifests itself along three main lines. First, economically: shifting demographics and rising purchasing power are making consumer markets in Asia, Latin America and, in time, Africa, increasingly important for European companies. At the same time, European economies are increasingly dependent on raw materials, technology, knowledge and labour from the South. Major investments in the green and digital transitions and the defence industry, all necessary for Europe's strategic autonomy, cannot be realised without cooperation with countries in the Global South, for instance in terms of access to critical raw materials. In terms of knowledge, the high-tech sector already depends on Indian engineers and with an ageing population, the broader need for labour migration is also growing. Conversely, Europe relies on cooperation with countries of origin to address irregular migration and facilitate the return of rejected asylum seekers.

Second, geopolitical dependencies are increasing, with cooperation with countries in the Global South being crucial to protect European security interests. The more countries move towards Russia, the stronger Russia's position becomes - a direct threat to Europe, given the war in Ukraine and tensions along NATO's eastern flank. Even if the situation with China is not exactly the same, it is still true that the weaker the ties between Europe and the Global South, the stronger China's relative political and economic influence in those regions becomes. This makes it more difficult for Europe to pursue its own interests in those countries and also increases Europe's direct dependence on China, for example for the import of raw materials that end up getting processed in China. Moreover, both Russia and China are actively working to expand their influence in countries in the Global South.

Third, southern partners are essential to sustain and strengthen multilateral cooperation, a core interest for the Netherlands. This has become even more urgent since the US has withdrawn from the World Health Organisation (WHO) and the Paris Climate Agreement. Such steps undermine the collective ability to address global problems, which also directly affect the Netherlands, as the coronavirus pandemic showed. The US had already disrupted the functioning of the World Trade Organisation (WTO) by blocking appointments to the Appellate Body. The recent import tariffs represent another blow to the global trade system, on which the Dutch economy is heavily dependent.

Promoting the international rule of law – a constitutional duty of the Netherlands – also increasingly depends on cooperation with emerging countries in the Global South. Military superpowers such as Russia, China and the US are increasingly reluctant or outright dismissive of essential principles of the international legal order and the institutions that uphold them, such as the International Court of Justice and the International Criminal Court in The Hague. In this context, the Netherlands is also becoming more reliant on partnerships with countries in the Global South in this area.

2.2 Geopolitical scenarios

Europe will need to manage these dependencies in an increasingly unstable geopolitical context. The first signs of this became visible in the years following the 2008 financial crisis, with growing assertiveness from both Russia and China. Tensions have risen sharply since then, as illustrated by the Russian invasion of Ukraine, escalation in the Middle East, new conflicts on the African continent, a more confrontational Chinese stance towards Taiwan and, since early 2025, the new direction taken by the US.

Each of these developments has its own dynamic, but for several of them, the rise of the Global South also plays a background role. Russia likely felt more comfortable invading Ukraine knowing that powerful players such as China and India would be reluctant to condemn it. Trump gained support among American voters by arguing that emerging economies such as China and Mexico are developing at the expense of the US and promised to bring industries back home. China, in turn, may feel more room to be assertive towards Taiwan as the West is preoccupied with Ukraine.

In short, geopolitical developments are the result of a complex interplay between national, regional and global events and trends. Even the present is difficult to interpret, let alone the future. In this context, outlining potential scenarios can be helpful.

First, a brief look at the past. The bipolar world of the Cold War – with a western bloc led by the US and a communist bloc under the Soviet Union – was followed by a unipolar period in which the US held dominance in military, economic, technological and cultural domains. The report by the Netherlands Scientific Council for Government Policy (WRR) describes the end of that unipolar order and a fragmentation of global power centres.²⁶ As noted, China has undoubtedly emerged as an independent power centre, or geopolitical pole, within a short period of time. How other countries will relate to these two superpowers remains uncertain.

Figure 5 illustrates four possible scenarios, varying in terms of 'polarity' (two or several dominant poles) and 'polarisation' (the degree of mutual tensions). Reality will likely involve a mix of elements from these different scenarios and power dynamics may differ by topic or domain. Each scenario carries specific implications for the position of Europe, the Global South, and for their mutual relations.

Scenario 1: Dominant bipolar rivalry

The rivalry between the US and China dominates the global order, in a scenario reminiscent of the most tense episodes during the Cold War, between the US and Soviet Union. There is growing competition and decoupling between the two superpowers. Other countries are forced to take sides: good relations with one of them preclude meaningful relations with the other:

- The EU faces a dilemma. Its dependencies on the US for defence and distrust of China likely lead to an uneasy and also uncertain alignment with the US.
- Countries in the Global South make varying choices. Given trade relations, many African countries will likely opt for China. Southeast Asian countries face a dilemma similar to Europe's: do they prioritise economic ties with China or side with the US as a security guarantee against possible Chinese aggression in the region?
- Limited scope for multilateralism to tackle global issues. Globalisation is coming to an end, and entirely separate supply chains emerge around the two superpowers.
- Cooperation between the EU and countries in the Global South seems logical, but is also difficult due to the dominance of the two major powers.

Scenario 2: Bumper car world

Multiple autonomous power poles interact in a disorderly and often tense environment. There is a high degree of polarisation, with frequent bilateral tensions, such as between the EU and Russia, or between China and India, that can escalate and pull other countries into their disputes. This scenario corresponds with the concept of 'multi-polarisation', as described in the Munich Security Report 2025.²⁷

- The EU is striving to assert itself as an autonomous power pole, though internal divisions make this challenging. The international context is unstable with recurring friction between poles. While cooperation is possible, it tends to be limited and marked by mutual suspicion.
- Emerging middle powers in the Global South, such as India and Brazil, form poles of their own. Weaker states are often forced to choose sides. Domestic politics in countries like Sri Lanka or Bangladesh increasingly revolve around the choice between India and China, in Southeast Asia between the US and China, and in the Middle East between Iran and Saudi Arabia.
- There is some scope for multi-alignment and trade between different poles but with limitations, especially when tensions between poles escalate.
- Preoccupied with its own place in the world as an autonomous power, the EU must constantly navigate a balancing act in its relations with other poles, including those in the Global South.

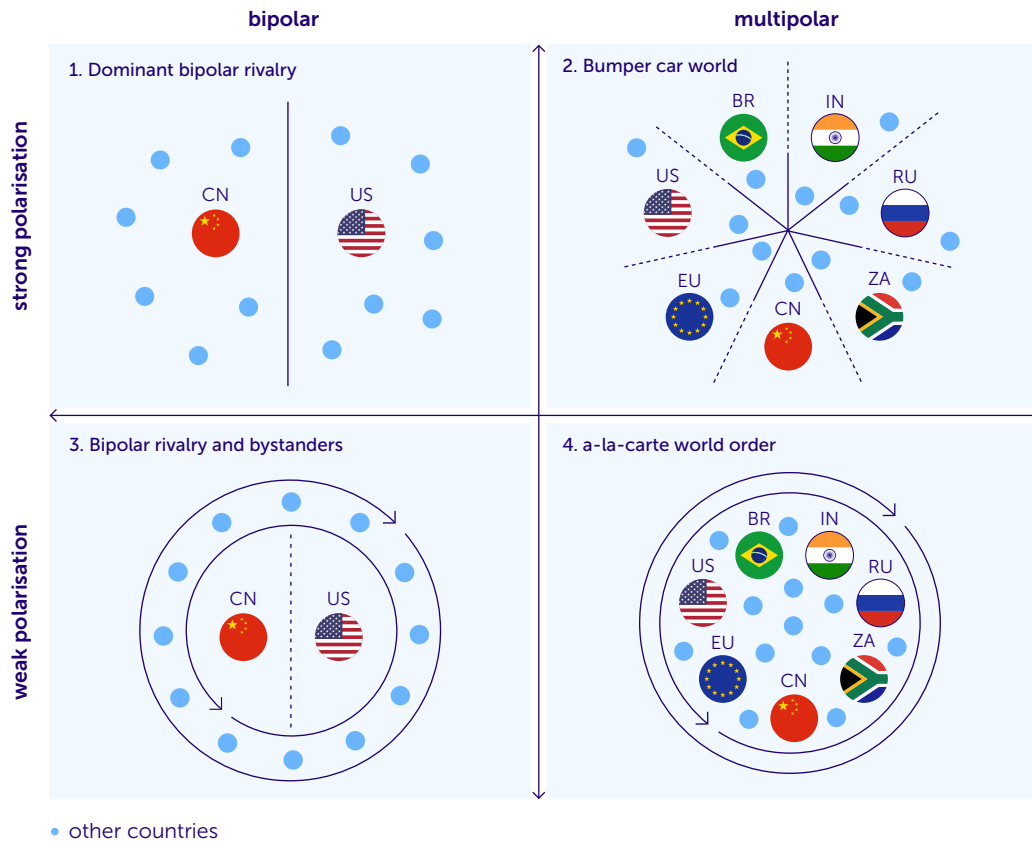
Scenario 3: Bipolar rivalry and bystanders

The US-China rivalry remains an important factor in the global order, but is not dominant or all-encompassing. This scenario is reminiscent of certain periods during the Cold War when tensions between the US and the Soviet Union eased, creating space for the Non-Aligned Movement. In today's context, this would mean that other countries (the bystanders) are certainly engaged with US-China competition, but still have room to manoeuvre between them.

- The EU and the Global South find themselves in the same boat. Both must tread carefully where American and Chinese interests collide but are not forced to make a definitive choice between the two. In this scenario, Europe and the Global South can reinforce each other.
- There is space for a modern version of the Non-Aligned Movement and reasonable scope for multilateralism. Individual countries and companies can continue to trade with both China and the US.

Figure 5. Polar scenarios.

This figure illustrates various potential scenarios, varying in terms of 'polarity' (two or several dominant poles) and 'polarisation' (the degree of mutual tensions).



Scenario 4: A la carte world order

This scenario builds on the analysis by Timothy Garton Ash and Ivan Krastev (ECFR), presenting the world order as a kind of menu.²⁸ Smaller countries are able to assemble their own menu based on their preferences, cooperating with various major and emerging powers in different domains.

- The EU forms its own pole, with ample opportunity for cooperation with other poles.
- Emerging middle powers in the Global South also form their own poles and are able to navigate the geopolitical landscape on their own terms. Smaller and weaker states remain dependent on more powerful countries that can act as autonomous poles, but retain the option of multi-alignment with several of them.
- There is significant space for multilateralism and cooperation between the EU and countries of the Global South, both to address global challenges and to pursue their own interests.

It is important to underline that all four scenarios contain elements that may be verified in reality. Much will depend on the future positioning of the US, but also on the actions of China, the EU and countries in the Global South. Each scenario offers different possible courses of action.

2.3 Implications

The Munich Security Report 2025, published ahead of the annual security conference, is partly based on opinion research among 11,000 respondents in 11 countries (the G7, Brazil, India, China and South Africa), conducted before Trump's inauguration. The results reveal a wide divergence in perspectives on the changing world order. Around one-third still view the US as the

dominant superpower, another third see a bipolar order (US and China) and a quarter believe that multiple powers already wield roughly equal power. The report suggests that we may be living in a multiplex world where different orders coexist. This fluidity makes positioning more difficult but also creates space to steer developments in a desired direction. It is therefore vital to have clarity on which scenarios are desirable, or undesirable.

Desirability

In the Global South, multipolarity is generally viewed positively. Large majorities in India, South Africa and China expect a multipolar order to result in a fairer distribution of prosperity, better adherence to international law and a more peaceful world. In contrast, scepticism prevails in EU member states such as France, Germany and Italy; there, people fear that multipolarity will lead to more tensions and conflict.²⁹

Yet, according to the AIV, the desirability of multipolar scenarios is also increasing from a European perspective. With Trump's stance during his second presidency, scenario 1 – a world dominated by the US and China – has become highly unattractive for Europe. Scenario 3 also carries risks: the US could exert pressure on Europe in various ways to limit cooperation with China. Scenario 2, in which multiple power blocs compete, offers Europe more strategic room for manoeuvre, but is accompanied by a higher risk of tension and instability.

Scenario 4 – a multipolar 'à la carte' order – is in many respects the most appealing. It increases the likelihood of a fair distribution of wealth and effective cooperation around global issues such as climate change. However, this scenario also carries risks: authoritarian states such as Russia, Iran and North Korea could operate more easily and strike deals, while assertive regional powers such as Serbia, UAE and Rwanda would have more room for military interventions, which could lead to instability. Therefore, investing in enhanced multilateralism and adherence to and enforcement of international law remains essential in this scenario. This will at times require confrontation and the drawing of red lines, something for which scenario 3 may allow more space. For instance, the EU's relationship with Russia and Iran is likely to remain structurally marked by a high degree of polarisation.

Course correction

None of the scenarios is ideal, but scenario 1 is clearly the least desirable. European countries, including the Netherlands, can actively try to steer developments in a certain way, depending on the direction the world order is taking. If the US were to push for scenario 1, it would make sense for Europe to strengthen its relations with countries in the Global South as a counterbalance. If the world moves towards scenario 4, Europe should make sure to adopt sharper stance towards states that question or undermine liberal values, such as China. In a situation of excessive multipolarisation, as in scenario 3, the risk of chaos and weakened global problem-solving capacities increases, making depolarisation all the more necessary. That is the challenge of our time: where the 1990s felt like a highway towards liberal democracy, we now find ourselves on a mountain road full of sharp turns that demand far better steering skills.

A second implication of this scenario exercise concerns the division of roles between the EU and its member states. On issues with higher polarisation, such as countering Russian aggression, the EU's collective strength is crucial. On issues with lower polarisation, there is more space for individual member states to act flexibly in terms of multi-alignment and multilateral cooperation. Member states can often move faster and seize opportunities.

A third point concerns the importance of emerging middle powers such as Brazil, India, Indonesia, South Africa and Nigeria. As long as the US and China remain the dominant players, which is likely even in the multipolar scenarios, better coordination between the EU and these countries can help with exerting joint influence and prevent undesirable developments, such as scenario 1.

Related to this is the final point: the scenario analysis has implications for the approach to BRICS. There is a tendency in Europe to see BRICS as explicitly anti-western and every new BRICS membership as a defeat. The decision by UN Secretary-General Antonio Guterres to attend the BRICS summit in Kazan, for instance, drew significant European criticism.³⁰ Individual BRICS members, such as South Africa, are regularly portrayed as anti-western.³¹ This is not a strategic approach, however. Criticising Global South countries for choosing the 'wrong friends' tends to be counterproductive - it reinforces the bipolarity that Europe should seek to avoid.

Moreover, this frame is not entirely accurate. A recent Chatham House analysis shows that Russia and Iran are indeed explicitly anti-western, seeking to overturn the current world order.³² That does not apply, however, for countries such as Brazil, India and Indonesia. These and many other countries in the Global South view international law and multilateralism as core interests and see Europe as a valuable actor within a multipolar order. They view forums like BRICS as one of the available options to pursue their interests.

It is true that these countries differ greatly from Europe in their perceptions of China and Russia. According to ECFR opinion research, that 78% of Indians and 63% of South Africans see Russia as an ally or partner, compared to only 25% in the EU.³³ Pew Research data show that in many western European countries, more than 70% have a negative image of China, while in Africa and parts of Asia, China's image is mostly positive.³⁴ Within this latter category, however, there are big differences. In the Philippines and India, less than 34% have a positive view of China, while in African countries like Nigeria and Kenya, that is more than 70% and in Thailand even 80%.

While Europeans often interpret close ties of southern countries with Russia, China or BRICS as a sign of distrust towards the West, that may not necessarily be the case. From a southern perspective, appreciation for Russia or China does not preclude appreciation for Europe; this fits within the broader aspiration for a multipolar world. For example, 73% of African youth see EU influence in Africa as positive – slightly lower than the 82% for China, but still a large majority.³⁵

That does not mean that relations with the West are flawless, quite the contrary. Many countries in the Global South have criticised how the West has shaped the international order for decades, often pointing to double standards. At the same time, anti-western forces such as Iran, Russia and to a certain degree China, exploit these sentiments for their own gain. Europe must recognise and counter this instrumentalisation but must not ignore the underlying, widely shared discontent. Brushing aside the legitimate concerns of the Global South risk playing right into the hands of Russia and China. The challenge for Europe is to adopt an open, self-critical yet strategic stance: listening and engaging with justified criticism without unwittingly advancing the agenda of geopolitical rivals.

To rebuild meaningful European connections with non-traditional partners in the Global South, it is therefore essential to deeply understand the widespread dissatisfaction with the existing world. Chapter 3 will further examine its nature and origins .



Celebration of Keti Koti in Amsterdam, the annual commemoration of a shared and fraught past of oppression and resistance. In the relationship between European countries and the Global South, experiences of hierarchy, marginalisation, and structural inequality continue to reverberate. At the same time, calls are growing for recognition of historical perspectives that have long been ignored. Structural attention to this history — and how it continues to shape the present — is essential for mutual understanding and rebuilding trust. For Europe, this means making a serious commitment to a truly equal partnership, based on shared values, respect, and cooperation.

Southern perspectives

Given the enormous diversity of the Global South, both between and within countries, it is impossible to present ‘the perspective’ of the Global South on the changing world order. This chapter will cover a variety of perspectives, based on expert consultations, literature and opinion research. The focus is on how different actors look at Europe. The chapter will first address topics related to international politics, stability and the rule of law, before looking at the international economic order and finally at multilateral cooperation.

3.1 Politics, rule of law and stability

The long history of double standards

The historical burden of slavery, oppression and colonialism will continue to mark relations between Europe and the Global South for a long time to come. Yet not everyone is on the same page when it comes to this history. While for many Europeans it now feels like a closed chapter, it remains much more prominent in the Global South. From a European perspective, the Second World War and the fall of the Berlin Wall were the defining moments of the 20th century – events that are still commemorated annually in many places. For large parts of the world, the key milestones lie elsewhere. There, the most important national holidays and commemorations often refer to the period 1947-75, when most countries in Asia and Africa gained their independence.

In countries such as Indonesia, Kenya, Algeria and Mozambique, colonial powers tried to avert independence by force, leaving a deep impact on post-colonial relations. But even in countries where decolonisation occurred more peacefully, relations remained tense. Former colonial powers were soon suspected of interfering in domestic politics. A painful example is the Belgian involvement in the assassination of popular leader Patrice Lumumba in the Democratic Republic of Congo (DRC) in 1961.³⁶

This was also the time of the Cold War. The West saw itself as a champion of freedom and democracy, in opposition to communism. From a southern perspective, however, the West appeared mainly driven by its own geopolitical and economic interests. Belgium was not alone in going after Lumumba. The United States also wanted to see him removed from power due to his rapprochement with Moscow. Authoritarian leaders were tolerated or even actively supported by the West, as long as they kept the Soviets at bay. The Mujahedeen rebels in Afghanistan were given arms to overthrow the Soviet-backed government in Kabul, while the African National Congress (ANC) fighting apartheid in South Africa was seen as a terrorist movement and received no direct western support.

The accusation of double standards is therefore nothing new. It resonates so strongly precisely because it is deeply rooted in history. It goes much further back than the Cold War, to the 1791 Haitian revolution against French rule. Double standards were a source of deep frustration even then. The French revolution of 1789 championed *'liberté, égalité et fraternité'*, but the revolutionaries in Paris did not consider these principles applicable to the enslaved people in the Caribbean.³⁷

Human rights and international law

The debate on double standards is highly topical when it comes to compliance with international law and human rights, and regularly creates friction between Europe and the Global South. From a European perspective, there are serious shortcomings in many southern countries, for example in cases where minorities are oppressed or activists and opposition politicians are silenced. European governments and civil society organisations raise concerns about human rights and shrinking civic space through various channels, which frequently leads to irritation among governments in the South.

Some conclude that human rights are a western concept, which cannot be applied to other societies. This is far too simplistic. As outlined in the 2022 AIV report on human rights, many countries in the Global South made significant contributions to the international human rights system, shaped by their own experiences of colonial oppression.³⁸ Many regions also have their own human rights treaties, such as the African Charter on Human and Peoples' Rights.

That said, there are different perspectives on human rights, and the earlier AIV report identifies four schools of thought, each with its own emphasis.

1. Individual freedoms and civil and political rights. This is the dominant perspective in the West and is enshrined in the International Covenant on Civil and Political Rights (ICCPR). Individual freedoms are also an essential prerequisite for the rule of law.
2. Socio-economic rights, such as access to food and housing. These are laid out in the International Covenant on Economic, Social and Cultural Rights (ICESCR), and are strongly championed by China.
3. Religious values, as elaborated for example in the 1990 Cairo Declaration on Human Rights in Islam, which many Islamic countries emphasise.
4. Communal responsibilities, which complement individual rights, and are reflected, for instance, in the African Charter.

While these perspectives can be at odds with one another, it is important to note that core principles such as human dignity and right to life form a shared foundation. Moreover, human rights serve as a safeguard for cultural diversity.³⁹ The AIV report emphasised that universality does not equate to uniform application; differences in cultural and historical contexts matter and states have a margin of appreciation in how they interpret and implement their human rights obligations. From the Global South, there is regular criticism that European actors often only accept their own interpretation of human rights. For example, where the Netherlands strongly advocates for LGBTQ+ rights from a position of respect for individual freedoms, such discussions require cultural sensitivity, particularly in countries with strong religious influences, to ensure that the language used supports a productive dialogue.

It is also notable that European countries tend to respond strongly to shortcomings in civil rights, while extreme poverty and hunger are rarely recognised as human rights violations, even though they are classified as such under international treaties. This imbalance is also reflected in the debate on the Right to Development, which was established in a 1986 UN resolution. Since then, many countries in the Global South have called for a binding treaty outlining the international obligations that would entail.⁴⁰ Western countries have opposed such a treaty, fearing legal and political consequences.

According to a recent IOB (the independent evaluation unit of the Ministry of Foreign Affairs) report, the Netherlands' human rights policy indeed does not align sufficiently with the priorities of southern countries.⁴¹ Another example is the anti-racism resolution, viewed by African countries as an important addition to the human rights framework. The Netherlands voted against it, which according to the IOB hindered cooperation with these countries and distanced the African group.

A frequently heard frustration concerns the double standards in European responses to different human rights violations. Some authoritarian regimes, such as Iran and Venezuela, are subjected to sanctions, while Saudi Arabia has never faced such measures, not even after the murder of journalist and dissident Jamal Kashoggi. This creates the impression that human rights are less important when European interests are at stake. President Saied of Tunisia, for instance, seems to have more leeway because Europe needs him for a coveted migration deal. This perception of double agendas behind a curtain of lofty words plays a significant role in the rise of anti-western sentiment.

A recent source of indignation is Europe's stance on the Israeli war in Gaza. The lawsuit brought before the International Court of Justice by South Africa, over possible violations of the Genocide Convention, has been widely supported by countries in the Global South, including Indonesia, Malaysia, Brazil, Mexico and Colombia. Only a few EU member states (Belgium, Ireland, Slovenia and Spain) joined the lawsuit while major member states such as France, Germany and Italy actively opposed it. Even after the court's preliminary ruling, which declared the case admissible and imposed provisional measures, European and Dutch policy towards Israel hardly changed.

The contrast with the fierce European reaction to other human rights issues, such as labour and LGBTQ+ rights surrounding the FIFA World Cup in Qatar, leads to incomprehension.⁴² This is also evident in opinion surveys, particularly in the Middle East. In Iraq, Jordan and Morocco, less than half the population still has a somewhat positive view of European countries. Countries such as Qatar, Türkiye, China and Saudi Arabia mostly score above 75%, and Russia also scores higher.⁴³

International security and military interventions

The western response to Israel's war in Gaza has added a new chapter to a long-running debate about the legitimacy of military intervention and international reactions to it. Following the Russian invasion of Ukraine in February 2022, Europe hoped for broad global support for a clear condemnation of this violation of the sovereignty of a neighbouring country.

There was therefore disappointment when, on 2 March 2022, 35 countries, mostly in Africa and Asia, abstained from voting on the first UN resolution calling for a full Russian withdrawal. Among them were major players such as China, India and South Africa. Yet the notion that 'the Global South' refused to condemn Russia is only partly accurate. The resolution passed with a large majority of 141 member states, including nearly all of Latin America and a large number of African and Asian countries such as Nigeria, Ghana, Kenya, Indonesia and Thailand. However, it is true that, apart from Singapore, no southern country has imposed sanctions on Russia.

Several factors play a role. Many countries did not want to take measures that could lead to higher food and energy prices, or provoke costly Russian countermeasures. Many governments also refer to previous western military interventions, such as in Iraq and Libya, as examples of double standards. From a western perspective, these are incomparable situations, since those cases did not involve annexation but rather the ousting of dictators. However, many southern countries perceive other western interests as the main motivation behind those interventions. Former South African president Thabo Mbeki, for instance, argued that the intervention in Libya was primarily about gaining access to oil.⁴⁴ This image of western hypocrisy did not help to garner support for the European stance on Russia.

That willingness has decreased further since most western countries refused to clearly condemn Israeli violence in Gaza after October 2023 and abstained from voting on relevant UN resolutions. In much of the Global South, this is seen as further confirmation of double standards regarding violations of human rights and international law.

Besides perceptions of hypocrisy, there are also real differences in how the conflict in Ukraine is viewed. In Brazil and South Africa, about 60% of the population – similar as in Europe - see Russia as chiefly responsible for the continuation of the conflict. In India (38%) and Indonesia (28%), however, those numbers are considerably lower.⁴⁵ Among African youth, Russia is often not even seen as the primary culprit for the war: 45% point to the West or Ukraine, while only 20% clearly blame Russia.⁴⁶

Conflict in the Sahel

Particularly in French-speaking Africa, distrust towards Europe has increased sharply, due in part to French policies regarding its former colonies. In the late 1950s, when the movement towards independence had become undeniable, Paris presented the colonies with a choice: independence on French terms – with protection of French economic interests – or a full ‘hard’ independence, in which France would withdraw completely. Only Guinea opted for the latter. In response, France severed all ties and took everything back with it - down to the lightbulbs in government buildings. It is not surprising that Guinea turned to Moscow for support and aligned itself with the Soviet bloc. Other French colonies opted for a form of independence that relied heavily on French support. This created the system of ‘*Françafrique*’, by which French businesses remained active, elites were courted with luxuries from Paris and France maintained geopolitical influence. All this brought little visible progress for the broader population, however, fuelling underlying resentment.

Since 2010, that sense of mistrust has accelerated further in the Sahel. In 2013, Mali requested French military support to combat jihadists, successfully halting their advance towards Bamako. That success was followed by Operation Barkhane, a much longer and more complex mission focused on counterterrorism across five Sahel countries. Despite years of engagement, jihadist activity continued to expand during this period, especially in Central Mali and Burkina Faso. Growing frustration over the lack of results intensified existing anti-French sentiment. In this context, Russian disinformation - alleging that French troops were secretly arming rebels and looting gold and uranium - fell on fertile ground, even among senior government officials.⁴⁷ Against this backdrop, coups took place in Mali (2020), Burkina Faso (2022) and Niger (2023), targeting leaders who cooperated with France.

The new rulers demanded the withdrawal of French troops. In 2024, even Chad ended its military cooperation, hitherto considered one of Paris’ most loyal allies. Senegal and Côte d’Ivoire soon followed. In February 2025, France closed its last base in Abidjan and is scheduled to leave Senegal by the end of that year.

In West Africa, this is seen as a logical step in the ongoing decolonisation process. For France, however, it is a painful experience. A speech by President Macron in early 2025, in which he expressed disappointment at the lack of gratitude, was met with disbelief in Africa. For many Africans, France is partly responsible for instability in the region – especially after the fall of Gaddafi – and its military interventions are seen as having succeeded only in prolonging the lifespan of inefficient governments. From that perspective, gratitude is not warranted.

Political governance

The WRR report on the fragmenting world order identifies five dominant worldviews that strongly influence how people perceive politics and society.⁴⁸ With the rise of the Global South, the western liberal democratic model is increasingly being called into question.⁴⁹ Besides the revisionist worldview, dominant in Russia, the worldviews ‘*traditionalism and civilisation*’ and ‘*post-colonialism and anti-imperialism*’ are particularly influential in many southern countries.

Research by Pew shows that religion plays a much bigger role in the South than in the West. In western European countries, including the Netherlands, fewer than 20% of people regard religion as important in daily life; in many African and Asian countries, this figure exceeds 80% - not only in Islamic societies but also in predominantly Christian countries such as Uganda, Kenya, Ghana and Zambia.⁵⁰ A majority in those countries believes it is important for political leaders to be religious and to express that publicly.⁵¹ Whereas politics in western countries is often based on a strict separation of church and state, this boundary is more blurred in many southern countries, including in democratic ones.

The post-colonial worldview is expressed primarily through a strong emphasis on sovereignty. The experience of colonial rule has fostered deep mistrust of foreign interference, making that European criticism of democratic shortcomings in the South is quickly perceived as unwanted interference. That does not mean there is no widespread support for democracy in the Global South. Pew research in 24 countries shows that 77% of people worldwide favour representative democracy, with high scores in countries such as Indonesia (76%), India (79%), Nigeria (76%) and Kenya (76%). Other surveys among African youth show that 69% consider democracy to be the best political model under all circumstances.⁵²

At the same time, 60% of them believe that 'western democracy' is not suitable for their country. Support for democratic principles can thus go hand in hand with criticism of European efforts to actively promote western-style democracy. However, the debate on sovereignty is highly complex. NGOs and opposition politicians in southern countries often feel that Europe is doing too little against authoritarian leaders who stay in power through electoral fraud. They find themselves in a difficult position: western support may be counterproductive, as authoritarian governments use it to dismiss them as puppets of the West. By overplaying our hand in the past, we now frequently find ourselves sidelined.

This issue is further complicated by a global trend: in many countries, including democracies, politics shows increasing signs of oligarchy. In countries like India, Türkiye and Brazil, power is increasingly concentrated in the hands of a small elite that dominates the economy, politics and media. More broadly, democratic norms and institutions are in decline around the world.⁵³ This is not an issue that is confined to the Global South; liberal democracies in the West have also come under pressure, with the US and Hungary as examples of democratic erosion from within.

It is also important to recognise that support for democracy cannot be taken for granted, anywhere in the world. Pew Research shows that globally, only 40% of people are satisfied with the way democracy is working, while support for authoritarian leadership is growing.⁵⁴ Satisfaction with democracy is still relatively high in India (72%) and Indonesia (61%), but strikingly low in Nigeria (25%) and South Africa (23%). Afrobarometer also reflects this declining support: in Mali and Burkina Faso, only a minority disapproves of military rule.⁵⁵ Disappointment in democracy is closely tied to a lack of economic progress and the failure to create decent jobs. To remain credible, democracy must 'deliver' not just on security, but also in terms of tangible economic benefits.

3.2 Economic transformation

The structure of the global economy is still shaped by the legacy of colonial history. For centuries, European colonial powers saw the Global South primarily as a source of raw materials and labour, to be used for production and profit maximisation elsewhere, often with little regard for people or the environment. The transatlantic slave trade is the most egregious example: millions of Africans were shipped to the Caribbean under appalling conditions and exploited on plantations.⁵⁶

A wide range of products were extracted from the Global South and brought to Europe - nutmeg from Indonesia, rubber and ivory from Africa, silver from Latin America. The dominant model revolved around the export of raw materials, with value creation taking place in the West. In India, the local textile industry was deliberately dismantled in order to enable the development of a textile industry in Britain. This history continues to influence how countries in the Global South view the international division of labour and capital and the role of the West within it.

Raw materials and industrialisation

Globalisation promised better access to markets and resources, yet many countries remain trapped in the role of commodity exporters.⁵⁷ According to UNCTAD, there are 101 commodity-dependent economies, where raw materials (energy, minerals, agriculture) generate over 60% of export earnings.⁵⁸ This applies to nearly all of South America, the Middle East, Central Asia and Africa, with the exception of Morocco, Tunisia and Egypt.

The Netherlands plays a notable role in certain supply chains. For example, it is the world's largest importer of cocoa beans, most of which are processed in the Zaandam area. Producers such as Côte d'Ivoire and Ghana have been advocating for years to have more domestic processing of cocoa, in order to retain more added value.

In many countries, there is broad consensus that natural resources should benefit the local economy and society to a greater extent. For example, 67% of African youth express concern about the negative impact of foreign mining companies and the unfair distribution of profits. There is a growing call for a much stronger role for local businesses.⁵⁹

Commodity dependence generally has adverse effects on national development. Processing and other downstream activities in the value chain generate more jobs, higher productivity, better wages and increased tax revenues. At the same time, commodity sectors are often vulnerable to corruption and concentration of power, with negative influence on the political economy of a country. Moreover, commodity prices are relatively volatile, leading to greater macroeconomic instability. Countries that rely heavily on a single export product, such as Angola on oil (78%) or DR Congo on copper (70%), are particularly vulnerable.

For many countries in the Global South, industrialisation is therefore a top priority. The global green and digital transitions appear to offer opportunities for such a structural transformation of their economies. More and more countries are focusing on the local processing of critical raw materials such as lithium, nickel and cobalt. Chile, for example, attaches domestic processing requirements to new mining concessions. Indonesia has been pursuing an active industrial policy in recent years, banning the export of unprocessed nickel to strengthen its domestic battery and steel industries.

At the same time, many developing countries experience that the current international economic order leaves little room for such policies. WTO rules, bilateral investment treaties and free trade agreements restrict the use of import tariffs, state aid or requirements on foreign investors regarding local processing or sourcing. Even countries such as Chile and Indonesia - relatively powerful players, especially in particular value chains such as lithium and nickel - face resistance, including from the EU (see Chapter 4). Smaller economies have even less policy space. The African Group within the WTO therefore calls for more flexibility.⁶⁰

Many development economists, such as Ha-Joon Chang, Dani Rodrik and Carlos Lopes, have pointed at the important role played by an active state in cases of successful development strategies, particularly in Asia. Although investments largely came from the private sector, governments played a key role through targeted industrial policies. This contrasts with the so-called Washington Consensus, as long promoted by western countries through the IMF and World Bank, which long advocated a minimal role for the state and full market liberalisation.

Not all countries followed this path; many did experiment, with varying outcomes. Some Asian countries developed a successful form of state capitalism, while others in Asia and Africa - pursuing seemingly similar policies - stalled, often due to poor governance or damaging forms of corruption.⁶¹ In short, identical policies can lead to different outcomes, depending on the political and economic context.

Still, many developing countries feel they continue to have insufficient policy space within the current liberal economic order - a source of frustration that touches on the broader debate about sovereignty. That sentiment is, also in this area, reinforced by the perception of double standards. Whereas countries in the Global South were long discouraged from pursuing industrial policies, western countries are now increasingly resorting to such policies themselves, under pressure from a rising China.

Under President Biden, the US stimulated large-scale investments through subsidies under the Inflation Reduction Act, while President Trump has introduced import tariffs to protect domestic industry. The EU is also actively developing its own strategic sectors through initiatives including the Green Deal, Clean Industrial Deal and Competitiveness Compass. Through new Important Projects of Common European Interest (IPCEIs), more flexibility is being created for the use of state aid, for example for batteries and semiconductors. From a southern perspective, these measures are not necessarily condemned, but they do raise questions, given the West's previous rejection of similar policies in the Global South.

This tension is also reflected in the opposition to the Carbon Border Adjustment Mechanism (CBAM), a European instrument for import tariffs on carbon-intensive products. Countries such as South Africa and India see this as a form of protectionism that hinders their industrial development. They point to the lack of sufficient financing and policy space to drive green industrialisation, while high-income countries protect and support their own industries. As described in the AIV advisory report on climate change, many countries perceive it as unfair that they are shouldering the burden of a climate problem that has been primarily caused - historically speaking - by western countries.⁶²

A similar controversy surrounds the EU's anti-deforestation regulation, which seeks to curb European imports of products that contribute to deforestation, such as palm oil. Malaysia and Indonesia argue that Brussels is unilaterally imposing rules without regard for the impact on their farmers and development ambitions. According to an ISEAS survey of policy elites, distrust of the EU as a partner is substantially higher in Malaysia and Indonesia (45-47%) than in Southeast Asia as a whole (28%), a difference that the report partly attributes to this issue of deforestation.⁶³

Access to capital

Limited access to affordable capital remains a structural barrier to economic development in the Global South. According to the UN, the annual financing gap for achieving the Sustainable Development Goals (SDGs) exceeds USD 4 trillion.⁶⁴ This includes both public and private investments, including in infrastructure, education, health care, climate adaptation and the energy transition.

While there is plenty of capital available globally, it does not automatically flow towards these areas. Private investors are traditionally cautious about investing in developing countries, partly due to high risk premiums based on credit ratings. This creates what many southern countries see as an unfair dynamic: high-income countries, which historically bear most responsibility for climate change, have access to cheap capital to finance their green transitions, while poorer countries are left to deal with the consequences, while also facing more expensive financing.

This situation has recently worsened. Global interest rate hikes to curb inflation have prompted investors to withdraw their money from riskier emerging markets. This has led to a worrying trend of negative capital flows to developing countries.⁶⁵ In other words, more money has been flowing out – through interest, dividend payments and debt repayments – than has entered through new investments.

Governments have also been hit by tighter financial conditions. In 2023, interest payments on public debt rose by 26% in developing countries, to nearly 850 billion dollars. In half of these countries, at least 8% of government revenue is spent on interest payments alone. In Africa, such payments are almost twice as large as total public spending on health care.⁶⁶

Against this backdrop, strengthening domestic tax collection has become particularly urgent. Fair taxation of multinational corporations plays a central role in this regard. Research shows that about a third of their profits are shifted to low-tax jurisdictions.⁶⁷ There is growing criticism from the Global South that discussions on tax reform mainly take place within the OECD, where their influence is limited. Many countries are therefore calling for a stronger role for the UN on this topic, so that their interests are better represented.

In addition, Official Development Assistance (ODA) remains essential, especially for the poorest countries with a narrow tax base and very limited access to capital markets. Although rich countries have committed to spending 0.7% of their gross national income on ODA, this target is being met by only a few small countries. In 2023, the average was just 0.37% and it is expected to decline further due to budget cuts in the US, the United Kingdom and the Netherlands, among other countries.

There is also significant discontent around climate finance. The pledge made by rich countries to mobilise \$100 billion annually from 2020 – in a mix of public and private funding – remained unmet for years. The outcome of the 2024 climate summit, which agreed to work towards \$300 billion annually from 2035, was met with disappointment. Many southern countries view it as inadequate and a postponement of responsibility, while they are already struggling with the acute effects of climate change.⁶⁸

Concerns are raised not only about the volume of development finance, but also about its quality. Despite commitments made between 2005 and 2012 to improve coordination and alignment with national systems and priorities, actual practice continues to fall short. A growing share of ODA spending has been directed from headquarters in donor countries, and a return to standalone projects, rather than channelling funds through recipient country budgets. This limits overall effectiveness.⁶⁹

As discussed in Chapter 1, China has emerged as a major investor and trading partner in the Global South over the past two decades. In Africa, China is often seen as an effective economic partner, thanks in part to affordable products and infrastructure projects. The Belt and Road Initiative (BRI) is mostly appreciated for its relatively swift, concrete and visible results without extensive conditionalities.⁷⁰ The stereotypical expression '*the Chinese come with a road project, the Europeans with a lecture*' is simplistic, but reflects a shared experience.

Yet, African criticism of China is also growing, particularly regarding debt burdens, exploitation and environmental degradation. In Ghana, 70% of the population says they are concerned about the ecological impact of Chinese investments.⁷¹ Moreover, in essence, the economic relationship with China differs little from that with the West: developing countries still primarily supply raw materials, which are then further processed in China.

3.3 Momentum for reform

This chapter has shown that objections to key aspects of the global order are not new and have deep historical roots. Attempts to adapt the order are not new either. In the 1970s, the G77 called for a New International Economic Order (NIEO), based on the idea that the existing order mainly served western interests and multinational corporations, and hindered industrialisation in developing countries. However, the initiative was held off by western countries, and never materialised. The debt crisis of the 1980s further diminished the influence of key advocates, particularly in Latin America.

Today, there appears to be new momentum for reform. The rise of influential countries in the Global South plays a role, as do more recent events. During the coronavirus pandemic, rich countries were only willing to share vaccines with poorer countries – even for vaccination of health care workers – after stockpiling enough doses to cover their entire domestic populations, even under the most pessimistic scenarios. Moreover, proposals by India and South Africa to temporarily waive patent rights on corona vaccines were rejected by western countries. South African President Cyril Ramaphosa captured the sentiment: *“It generated and deepened disappointment and resentment on our part, because we felt like life in the Northern hemisphere is much more important than life in the Global South.”*⁷²

The economic aftermath of the pandemic and the Russian invasion of Ukraine have further reinforced the urgency of economic reforms. Concrete proposals have come from the Global South, such as the Bridgetown Initiative by Mia Mottley, the prime minister of Barbados. Among other things, this initiative advocates the issuance of additional Special Drawing Rights (SDRs) through the IMF to provide developing countries with greater financial space, without generating additional debt. So far, rich countries have responded cautiously to this idea.

Southern countries have gained more influence than before through forums such as the G20 and BRICS to put reforms on the agenda, but their voting power in formal multilateral institutions remains limited. Organisations such as the IMF and the World Bank still reflect the power dynamics of shortly after the Second World War. For instance, the leaders of the IMF and World Bank have traditionally been a European and an American, respectively. The voting shares remain skewed: the Dutch voting weight in the IMF (1.76%) is almost twice that of Indonesia (0.95%) and over three times that of Nigeria (0.52%). These proportions are not in line with today’s economic and demographic realities.

While all countries are members of the UN General Assembly, this body relies on legitimacy and moral authority and has no real enforcement powers. The Security Council does have such powers but remains dominated by the five permanent members with veto rights. The lack of representation from Africa, South Asia, Latin America or the Middle East is viewed by many countries as a colonial legacy in urgent need of revision. However, reforming the Security Council seems like an almost impossible task. Several proposals have been circulated, such as that of the G4 (permanent seats for Brazil, India, Japan and Germany) and the African Union’s Ezulwini Consensus, which calls for two African permanent seats. Every proposal, however, runs up against entrenched interests, either from current permanent members unwilling to see their veto power diluted, or from other prospective members. In the absence of structural reform, procedural improvements may help to increase inclusiveness somewhat. For instance, the practice of automatically putting vetoed resolutions to a vote in the General Assembly, could help make the broader international consensus more visible.

Yet, without more sweeping reforms that give southern countries greater influence, the legitimacy of existing multilateral institutions is at risk of eroding. The likelihood increases that more alternative structures will emerge. To preserve institutions such as the World Bank, IMF and UN as effective global organisations, reforming their governance structures and decision-making processes is not only desirable, but necessary.



Bicycle factory in Sidoarjo, Indonesia. Countries in the Global South are taking on an increasingly prominent role in global production chains. They are developing their own industrial clusters, attracting foreign investment, and playing a growing role in raw materials, technological development, and trade. Nevertheless, the distribution of economic value, decision-making power, and knowledge often remains unequal. For Europe, this means that cooperation can no longer be based on asymmetry but must be built on reciprocity and shared interests. A more strategic industrial and trade policy is needed—one that promotes sustainable development, economic justice, and geopolitical stability in a multipolar world.

Europe's approach to the Global South

4.1 The changing European view of the South

Just as history plays a defining and ongoing role in southern perceptions of Europe, the reverse is also true. Several historical phases can be distinguished in shaping European views of the Global South.

The colonial era, which continued into the 1970s in some areas, has had a profound impact on European perceptions. While exploitation, violence and racism have always been central in how the South perceived this period, that understanding only reached wider acceptance in Europe later on. For a long time, the Global South was viewed through a colonial lens, shaped by a sense of superiority, dominance and hierarchy, including notions of 'benevolent works' such as sending missionaries or establishing schools.

After decolonisation, the relationship shifted to development cooperation, which contributed to tangible progress in many areas, such as health, education and infrastructure. This cooperation, based on the principle of sovereignty, marked a clear break from the colonial past. At the same time, it maintained or reinforced the image of the Global South as dependent and in need of European support, and the relationship remained marked by a hierarchical donor-recipient dynamic.

This was also the period of the Cold War, when cooperation was partly driven by the desire to counter Soviet-allied movements in the South (as described in scenarios 1 and 3 in Chapter 2). The Cold War was followed by a period of accelerated globalisation, characterised by the optimism that every country could, and would want to, develop along the western model of democracy and free markets. This mindset, dominant throughout the 1990s and 2000s, was captured in Thomas Friedman's book *The World is Flat*, even though it still carried the implicit expectation that the West would continue to stand above other regions.

Developments over the past 15 years confirm that Europe's image of the Global South is inextricably linked to the European self-image. In 2010, Dominique Moïsi described how three dominant emotions – fear, humiliation and hope – influence world politics.⁷³ According to him, the West is primarily driven by fear: fear of losing power, identity and stability. In many post-colonial societies, by contrast, a prevailing emotion is of humiliation, rooted in histories of domination and exclusion. Meanwhile, rising economies, particularly in Asia, are driven by hope on the back of strong economic growth and increasing geopolitical influence.

European fear thus appears, in part, to be a reaction to the assertiveness of hopeful powers claiming their place on the world stage. But it is also reinforced by concerns over instability and poverty in fragile states, which are seen as potential sources migration and security risks. Others are driven less by fear and more by frustration or disappointment, that many countries in the Global South are not managing to break with poor governance, corruption and human rights abuses.

Moïsi argued that fear is a poor guide in international politics, as it often leads to paralysis. Notably, Europeans are more pessimistic about their own influence than citizens elsewhere. In BRICS countries, some 60% view the EU as a player capable of acting on equal footing with global powers such as the US and China, compared to just 43% of Europeans.⁷⁴

In short, there is no reason to be driven by fear. A sense of realism would be a better compass. Acknowledging that Europe's dominance has diminished can also open doors to building mutually beneficial partnerships based on genuine equality. Hope is therefore a more constructive and realistic attitude. It enables Europe to engage with confidence, ambition and a forward-looking mindset – not driven by fear, but by trust and a willingness to work together with the Global South.

4.2 European Union policy

The Common Foreign and Security Policy (CFSP) operates under a separate, intergovernmental structure with a central role for member states, whereas trade policy falls under the exclusive competence of the EU. From this mandate, the EU has developed a range of policy instruments that are relevant to relations with the Global South.

Trade agreements are one of the key pillars of the EU's external policy. The EU provides preferential market access through the Everything But Arms (EBA) initiative for the least developed countries. In addition, it seeks to conclude comprehensive trade agreements, such as with the Mercosur countries, as a powerful means of strengthening relations through mutual economic benefits. However, negotiations on such agreements are often challenging, partly due to frictions over sensitive issues such as agriculture, sustainability and intellectual property rights.

Certain **autonomous EU measures** in the field of sustainability, such as the Carbon Border Adjustment Mechanism (CBAM) and the Deforestation Regulation, have implications for trade with the Global South. The CBAM introduces a carbon levy on emission-intensive products imported from countries with less stringent climate policies. The Deforestation Regulation imposes requirements on imports of products such as soy, coffee and palm oil: these may only be imported into the EU if it can be shown that the specific shipment did not contribute to deforestation.

Development cooperation remains an important instrument. In 2024, EU member states collectively contributed \$88.7 billion in Official Development Assistance (ODA), accounting for over 40% of the global total. Of this, \$27.6 billion was provided through the European Commission.⁷⁵ The Team Europe approach seeks to better align the efforts of the Commission, other European institutions such as the European Investment Bank, and the member states. This is intended to enhance the effectiveness and visibility of European development assistance and to reduce fragmentation.

The EU is also increasingly pursuing **strategic (migration) partnerships** with countries in its immediate neighbourhood, such as Tunisia, Egypt and Mauritania. These broad collaborations cover broad themes such as economic development, energy transition and security, but migration is often at the core. Through financial support, investments and political cooperation, the EU seeks to gain more control over irregular migration, by addressing root causes, strengthening border management and facilitating returns.⁷⁶

The **European Peace Facility** is a relatively new instrument aimed at promoting peace, security and stability. The fund supports partner countries in strengthening military capabilities and security forces. Although most of the budget has been allocated to military support to Ukraine, peacekeeping operations in African countries have also received funding. For example, the

Rwandan mission in northern Mozambique receives support, as does an African Union-led coalition combating Boko Haram in the border area between Nigeria and Cameroon. At times, concerns arise over potential human rights violations by troops receiving EU support.

The **Global Gateway**, launched in 2021, is the EU's flagship initiative for infrastructure investment in the Global South, with a focus on transport, (green) energy and digital connectivity. The EU has pledged a total of €300 billion in investments until 2027, half of which is earmarked for Africa. The initiative is intended as a sustainable and transparent alternative to China's Belt and Road Initiative (BRI), with potential for mutual benefit: access to raw materials and markets for Europe and investments and job creation for southern countries. However, there remains a risk that, in the Global South, it is perceived primarily as a reaction to China, rather than as a genuine commitment to equal partnership.

Raw Material Strategic Partnerships are aimed at improving and diversifying Europe's access to critical raw materials, which is under pressure due to geopolitical tensions and dependence on a limited number of countries. The EU has established partnerships with Kazakhstan, Namibia, Argentina, Chile, DRC/Zambia, Rwanda and Uzbekistan, among others. These partnerships go beyond trade and also include cooperation on environmental standards, production norms, capacity building and strengthening local added value.

In February 2025, the Clean Industrial Deal was announced. One of its key components is the establishment of Clean Trade and Investment Partnerships, building on the Global Gateway and raw material partnerships. The aim is to encourage investment in green industrialisation and technological cooperation based on mutual interests. Through more agreements on specific issues, such as mutual recognition of standards, the aim is to improve the investment climate for businesses.

In short, the European Commission has launched a series of relevant initiatives in recent years that have the potential to significantly strengthen relations with countries in the Global South, particularly because they are well aligned with the priorities of those countries themselves. However, effective implementation requires attention to several key issues.

First, there is the issue of **complexity**. The multitude of different instruments often makes it difficult for partners in the South to find out how Europe can support them in concrete ways. Various instruments are managed by different Directorates-General within the European Commission, each with its own priorities and requirements, for example on sustainability, inclusion and transparency. On top of this, there are additional initiatives by individual member states. Namibia, for example, now has four different European deals on green hydrogen investments, including one with the Netherlands.⁷⁷ China, by contrast, often presents a simpler cooperation structure. An African diplomat reportedly summed it up as: *"The Chinese make us an offer we can't refuse, the Europeans make us an offer we can't understand."*⁷⁸ Although that is an oversimplification – given the many actors on the Chinese side as well – the perception remains widespread that cooperation with the EU is relatively complex and slow-moving.

Second, ensuring timely and meaningful **southern involvement** requires greater attention. Partly due to the EU's complex internal structure, European initiatives are often only discussed with southern partners at a late stage. As discussed in Chapter 3, the way the CBAM and deforestation regulation were developed has damaged Europe's relations with key countries in the Global South. Earlier dialogue could have helped mitigate points of contention, for instance by including exemptions for the poorest countries or vulnerable groups.

Dialogue also initially fell short regarding the Global Gateway initiative. The first plan was drafted by European diplomats and shared with partners just ahead of an EU-Africa summit, almost as a *fait accompli*.⁷⁹ This was a missed opportunity to launch it as a joint initiative. The Commission

will need to engage in dialogue at an earlier stage, to hear and address concerns from the Global South. Member states like the Netherlands could also push for this more strongly in Brussels.

A third challenge concerns the role of the **private sector**. Economic cooperation ultimately depends on the willingness of companies to invest in the Global South. This often proves to be a bottleneck: companies tend to avoid countries they are unfamiliar with or consider high-risk. Moreover, the complexity and variety of instruments and requirements also poses difficulties for the private sector, making it harder to navigate and benefit from European initiatives. This can result in EU programmes primarily improving general frameworks and business environments - while Chinese firms may often be best positioned to benefit from these efforts.⁸⁰ This dynamic could also be at play in Europe's involvement in the Lobito Corridor, a rail project that will connect the Zambian-Congolese copper belt to the Atlantic Ocean in Angola.⁸¹

Due to its market-oriented approach, Europe has little experience in actively shaping strategic investment projects abroad. China is more effective in this regard, partly because of stronger coordination between government and industry.⁸² Europe could provide more structural support to its own companies investing in sectors that are in line with the goals of both the Commission and southern partners, such as technology transfer and local value addition. Improved cooperation between European development banks and export credit agencies could be an important enabler.⁸³ In a sense, what is needed is a form of European industrial policy geared towards mutually beneficial economic activities abroad. For instance, a strategic vision for green steel production could leverage the solar energy potential in North Africa and support the production of intermediate goods like Hot-Briquetted Iron (HBI) there. Rather than exporting green hydrogen, a country like Morocco could export such intermediate goods to the European steel industry.⁸⁴

A fourth point of concern relates to the **consistency and coherence** of policies. Many EU instruments are, in principle, well aligned with the desire of southern countries to increase local processing. But this part of the agenda demands persistence, given the many challenges involved. Without additional efforts, there is a risk of falling back into the familiar pattern: raw materials and energy from the South, with added value in Europe.⁸⁵

This risk is also evident in trade policy. In negotiations with countries like Chile, Mexico and Kazakhstan, the EU has pushed for restrictions on industrial policies that go beyond WTO obligations. The EU initiated proceedings against Indonesia over export restrictions on raw nickel, meant to support its domestic battery industry. Similarly, the EU has raised duties on steel imports from countries, including India, that promote local processing by granting their domestic steel industries preferential access to raw materials.⁸⁶

4.3 Policies of individual member states

There are significant differences between EU member states in their approaches to the Global South, often rooted in historical, cultural and geographical factors. European societies once exerted colonial influence over nearly the entire globe, leaving deep imprints on political, economic and social relations. At the same time, much of the responsibility for this legacy lies with eight member states that were actively engaged in colonial rule or participated in the transatlantic slave trade. The other member states, particularly those in Central and Eastern Europe, do not share this history, or only to a much lesser extent.

Eastern European countries orient their foreign policy primarily around the perceived threat from Russia and tend to show less engagement with the Global South. Yet there are historical links. During the Cold War, Eastern Bloc countries maintained close relations with communist regimes

in the South, sometimes leaving a lasting influence, such as the relatively close ties between the Czech Republic and Vietnam. Southern European countries such as Spain, Portugal tend to focus more on Latin America and, to a lesser extent, Africa. This orientation is shaped by shared language, migration flows, colonial history and - with respect to North Africa - geographic proximity. France maintains a particularly strong focus on Francophone Africa.

Diaspora communities, as part of European societies, also play a growing role in shaping perceptions and positioning towards the Global South. This can help strengthen relations, but may also give rise to tensions, particularly when political conflicts from countries of origin spill over into Europe, or when diaspora communities adopt a more critical stance towards a specific government and become subject to transnational repression.⁸⁷

These differences among member states influence geopolitical positions and priorities. Views diverge, for instance, on how to engage with military regimes in the Sahel. France advocates a tough stance, driven by security concerns and the rise of anti-French sentiment in the region. Scandinavian countries also favour a hard line, primarily on human rights grounds. In contrast, Spain and Italy have opted for a more pragmatic approach, motivated by concerns over migration.⁸⁸

Western European member states, in particular, maintain active bilateral relations with a wide range of countries in the Global South. These relationships are typically anchored in development cooperation and trade promotion, but other dimensions also play a role:

Germany has a relatively limited colonial past compared to France and the UK, but it has developed a strong tradition of cooperation and exchange, resulting in strong and robust networks. Political foundations such as the *Konrad Adenauer Stiftung* (affiliated with the CDU) and *Friedrich Ebert Stiftung* (SPD) play an important role in this regard.

Over the past decade, Germany has significantly increased its ODA spending, to almost 0.7% of its gross national income. Despite upcoming budget cuts, Germany is expected to remain by far the largest European provider of ODA and possibly even the largest globally, following the dismantling of USAID. Recently, a high-level commission called for a new perspective on German relations with the Global South.⁸⁹

Italy launched the Mattei Plan in 2023, to strengthen cooperation with African countries, with an emphasis on economic investment. The plan takes a transactional approach, prioritising migration management and energy interests. It remains to be seen how effectively the plan will be implemented and what its long-term impact will be.

The Netherlands has an extensive colonial history, including in Indonesia, Suriname, the Caribbean and South Africa. In recent years, the country has shown considerable initiative in acknowledging and addressing this past, more so than many others have done. In 2020, King Willem-Alexander issued an official apology for the state violence during Indonesia's war of independence. This was followed in 2022 and 2023 by apologies from the government and the King, respectively, for the Netherlands' role in the history of slavery. As then-Prime Minister Rutte emphasised, this recognition should be seen as a comma, not a full stop. Further follow-up actions will be needed, for example through the restitution of colonial-era art, such as the return of the renowned Benin Bronzes to Nigeria by the Wereldmuseum Leiden in 2025.

In the area of development cooperation, the Netherlands was a frontrunner for a long time, but this position has come under pressure due to budget cuts. Moreover, Dutch aid has increasingly shifted towards centrally managed thematic programmes, while direct cooperation with governments at the country level has been minimised.⁹⁰ This may have reduced the effectiveness of development policy as an instrument for strengthening relations with countries in the Global South.

Economically, the Netherlands remains an important trade and investment partner for many southern countries. The government supports this through trade missions and instruments provided by the Netherlands Enterprise Agency (RVO). However, it lacks a more strategic approach to promote targeted Dutch investments aligned with the priorities of partner countries. Since 2022, the Netherlands has been working with a list of 14 'combination countries' where aid and trade should converge. While this has produced promising projects in specific sub-regions, scaling up to the level of strategic cooperation that strengthens entire economic sectors, remains a challenge.

Several policy initiatives in recent years have laid the groundwork for a renewed approach to the Global South. The Africa Strategy for 2023–2032 explicitly centres on equality and mutual interests. An initiative is also underway for 'enhanced engagement' with selected countries in the Global South, though it is too early to identify concrete results. At the same time, planned budget cuts to knowledge and network-strengthening instruments are likely to undermine deeper engagement. For instance, specialist academic fields such as Arabic, Persian, Turkish, Islamic studies and modern Middle Eastern studies are at risk of disappearing from Dutch universities.⁹¹ The Orange Knowledge Programme, which provided over 10,000 scholarships to students from the Global South between 2017 and 2024, has been discontinued due to budget cuts, with no clear alternative.

The Netherlands will have to step up efforts to avoid losing relevance in the Global South. Chapter 5 explores potential pathways.



Presidents Lula da Silva (Brazil) and Prabowo Subianto (Indonesia) during a bilateral meeting in Brasília, July 2025. Countries in the Global South are actively seeking new forms of cooperation, including through platforms such as the G20 and BRICS. Such meetings reflect the pursuit of greater influence, institutional reform, and shared ownership in multilateral decision-making. For Europe, this means it must adopt a proactive stance in international diplomacy and the creation of new alliances. Only then can it remain relevant in a world where traditional power dynamics are increasingly shifting.

Cooperation with the Global South in a changing world order

The shifting geopolitical landscape calls for an adjustment of the dominant logic of Dutch and European foreign policy. For decades, the focus was primarily on other high-income countries and OECD members, while the rest of the world remained in the background. These countries were mainly seen as recipients of development aid or markets for trade, but were rarely approached as full-fledged partners for long-term strategic cooperation. This mindset is no longer tenable, especially now that our most powerful ally, the United States, is charting a new course. Europe needs countries in the Global South more than before, not only to secure specific interests, but also as partners for a just and stable world order. Only in such a world can the Netherlands, and Europe, enjoy sustainable prosperity.

Europe must therefore step out of its geopolitical comfort zone and forge deeper relationships with countries that have long been considered more distant – culturally, politically or economically speaking. At times, these countries may indeed have different values and interests, which means this will not always be an easy task. The challenge is all the greater because Europe must simultaneously adapt to a new reality in which its own influence has declined compared to the past. However, that does not mean that Europe has lost its relevance: it remains influential, with a societal model that much of the world continues to value. If Europe manages to strike the right balance, a new perspective emerges – one in which Europe can thrive in a changing world, alongside partners from the Global South, through more equitable relationships and from a less dominant position.

This chapter outlines what is needed to achieve this goal, in light of the scenarios presented in Chapter 2. It discusses, in turn, general guiding principles, EU policies and finally national policy in the Netherlands, while recognising that these levels are closely intertwined.

5.1 General guiding principles

Uncertainty about future geopolitical developments is greater now than it has been in a long time. As outlined in Chapter 2, several scenarios are conceivable. What is certain is that – in every scenario – the importance of the Global South is set to grow, albeit in different ways. In the bipolar scenarios (1 and 3), Europe and the Global South will need each other as strategic partners to counterbalance the dominance of China and the US. In scenario 2 ('multipolarisation'), regional tensions may emerge between competing power blocs, requiring the EU to position itself as an independent pole capable of carefully balancing relations with various emerging and middle powers in the Global South. That requires deep and broad knowledge of, and networks in, these regions.

Scenario 4 offers more space for cooperation and multilateralism, in which individual EU member states could also play a more active role. In such a world, where cooperation takes centre stage, the demographic and economic weight of countries in the South becomes even more decisive.

In short, whichever scenario materialises, Europe will inevitably need the Global South and must work to strengthen relationships and mutual trust. In doing so, it is helpful to follow a number of overarching principles, regardless of the specific country, theme or actor.

Take a long-term view of interests and relationships. Many in the Global South appreciate China's clarity about its own interests, whereas Europe is often perceived as masking its interests behind lofty language and noble goals. From the perspective of mutual respect, Europe would do well to be more transparent and honest about its own interests.

This does not mean, however, that simply putting short-term interests on the table – such as access to raw materials or reducing migration – and pursuing a purely transactional approach will suffice. Especially given the weight of historical injustice and unequal starting positions, such an approach is not sustainable. It would risk reinforcing the perception that the world order primarily serves the interests of traditionally dominant western powers, while weaker states lose out. It offers no answers to legitimate criticisms of the western-dominated global order. Especially with President Trump in the White House, this approach could contribute to a bipolar dynamic – in line with scenarios 1 and 3 – which is not in the European interest. Instead, Europe should – more in line with scenario 4 – seek to identify long-term complementary interests with countries in the Global South, for instance around economic development, local processing of raw materials, migration cooperation and addressing global challenges such as climate change.

Handle contradictions with care. At the same time, it is essential to be mindful of tensions. At times, conflicting interests or worldviews may arise that cannot be made complementary. In a multipolar world, where Europe's relative influence is smaller than before, making visible and tangible concessions will sometimes be necessary. This requires careful consideration, drawing on the WRR report's framework for balancing prosperity, values and resilience. A more equitable position of the Global South in the world economy may require a reassessment of priorities, even if it does not immediately translate into growing prosperity for Europe.

In addition, the European interpretation of universal human rights cannot be instantly applied everywhere in the world. Europe will at times need to deepen cooperation with countries that hold different views, adopting a posture of "agree to disagree" on certain issues, for example with the Gulf States. This, of course, does not mean that there are no red lines. Take LGBTQ+ rights: when sexual orientation is criminalised, European countries such as the Netherlands must continue to speak out clearly and stand up for affected communities. However, this is not the same as pressing for the legalisation of same-sex marriage. On such matters, the Netherlands must remain aware of local sensitivities, also to avoid provoking a counterproductive backlash.

In cases of violations of the international legal order, it is equally important to clearly define red lines, and to act consistently when they are crossed. When those lines are approached, Europe must raise the issue firmly – even if this requires polarisation, as foreseen in scenario 2. In doing so, it is crucial to actively seek support from countries in the Global South. This can help prevent such situations from escalating into the kind of unproductive and undesirable dynamic associated with scenario 1 – one of ‘the West’ against a particular country or regime in the Global South.

Constructive attitude. A balanced approach towards criticism of the West is essential: one that is constructive in the face of legitimate critique, without being naive about how such criticism may be exploited by Russia or China. Criticism of the West often carries a degree of hypocrisy, but the best response is not always to push back. For example, warning about China’s negative role in Africa can often be counterproductive and prompt the understandable response of *‘we’ll decide for ourselves who we choose to partner with’*. In some cases, and without losing sight of potential risks, it may even be an option to cooperate or coordinate with China, for instance to explore where Global Gateway and the Belt and Road Initiative could be complementary, in the interest of partner countries. This also helps to avoid the undesirable outcome of scenario 1: a dominant binary rivalry between the US and China.

Take initiatives from the Global South seriously. Global South countries are increasingly launching initiatives for international cooperation and reform, aimed at a fairer and more peaceful world. The Netherlands often responds cautiously to such initiatives if they contain elements it does not fully agree with, even when the initiative as a whole reflects values and ambitions that the Netherlands supports.

A recent example is the Hague Group, an initiative of countries such as South Africa, Chile, Malaysia and Senegal to strengthen international law and the position of the International Court of Justice and International Criminal Court in The Hague. As host country, the Netherlands could have played a bridging role. Examples in the economic domain include the aforementioned Bridgetown Initiative and recent Brazilian proposals within the G20 on taxing the super-rich and eliminating hunger.

Europe should show greater willingness to embrace southern-led initiatives, or endorse resolutions that are broadly in line with European positions, even if differences remain on specific details. By engaging more proactively with such proposals and investing in them, European countries like the Netherlands could strengthen their position among southern partners. In turn, it also increases the likelihood that these countries will support European initiatives. These kinds of proposals – launched by various countries from different regions – offer a key pathway through which the ‘à la carte’ multipolar world order of scenario 4 can take shape. Greater engagement with UN agency UNCTAD, which is widely appreciated in the Global South and of which the Netherlands is a major donor, could also help to build bridges in global policy debates.

Acknowledge historical responsibility. For centuries, Europe held a position of excessive dominance in the world, often used to subjugate others through colonialism and slavery. Even after the abolition of slavery and independence of former colonies, European power continued to be leveraged to exploit other societies through neocolonial mechanisms. To strengthen trust in the Global South, European actors must continue to invest in meaningful engagement with this painful past. Moreover, the history of colonial dominance brings with it a particular responsibility for addressing today’s global challenges, such as inequality and climate change. Without disregarding the roles of other countries and regions, past and present, it is important that European actors acknowledge their share of responsibility.

Listen and communicate on the basis of equality. Communication is key, particularly given the sensitive historical relationships between Europe and the Global South. The EU and its member states are, more readily than others, perceived as condescending or arrogant. While such perceptions may at times seem unfair to European actors, they are nonetheless real. This calls for strategic communication that avoids creating the image of Europe 'lecturing' other countries about what is good for them. In this context, it is also important to develop an effective response to anti-western disinformation circulating in the Global South, frequently spread by Russia. This should include supporting independent media. Such efforts are also a way to reduce polarisation and steer away from the confrontational dynamics of scenarios 1 and 3.

Knowledge and networks. Strengthening the knowledge base on different regions of the Global South is essential. In-depth understanding of historical, social and cultural contexts - combined with a strong information position on current developments - enables European actors to identify and interpret trends in a timely manner. This improves the ability to anticipate risks and opportunities. Moreover, knowledge of language, culture and history also directly helps to open doors and strengthen relationships. Greater investment is therefore needed in knowledge about the Global South, through universities, think tanks and the diplomatic network. Notably, the European field includes specialised think tanks for Africa, China and the Middle East, but very few focused on South and Southeast Asia. This is a gap that should be addressed, given the region's growing strategic importance.

Perhaps the most important element for enhanced engagement is investing in personal relationships and networks. The importance of more high-level ministerial visits – both incoming and outgoing - should not be underestimated. Exchanges in the areas of culture, education, media, economics and politics are also vital. China treats this as a strategic soft power tool and is now the largest provider of scholarships for African students. Europe should be more aware of this dynamic. Students from the Global South who study abroad often go on to hold key positions in their country's government or business community. If they have studied in Europe, this typically creates the basis for a lasting bond, which continues to shape their engagement with Europe throughout their careers.

5.2 Team Europe

In a more multipolar world order, more effective coordination between the EU and its member states is essential. In certain cases, it is obvious for the EU to take the lead. The Netherlands can support this by actively pursuing a Team Europe approach in such instances. It should also encourage other member states, particularly large ones such as Germany and France, to do the same. European institutions, in turn, could do more to coordinate member state efforts and provide more (timely) information about their own engagements with countries of the Global South. In addition, the Netherlands could use its position as a member state to advocate within Brussels for reforms that enhance the efficiency and clout of European institutions. A leading role for the EU, or a coalition of willing member states, is particularly desirable in the following areas:

Engaging with major emerging powers. When identifying priority partners in the Global South, democratic heavyweights such as India, Brazil and Indonesia quickly stand out. However, the Netherlands is far from alone in seeking deeper engagement with these countries. In New Delhi, Brasilia and Jakarta, numerous western delegations with similar ambitions are frequently knocking at the door. While it remains important to continue investing in bilateral relationships with these countries, it is not easy for the Netherlands to rise to the top of their priority list. It is therefore wise to adopt a 'Team Europe' approach wherever possible, such as by coordinating joint ministerial and official visits with other member states and enabling the European Commission and European External Action Service (EEAS) to take a leading role.

In situations of strong polarisation. When the interests and views of Europe and a country in the Global South diverge sharply – on issues such as human rights or security – clear lines may need to be drawn, and it then makes sense for the EU to take the lead. In practice, however, this often proves difficult as unanimity requirement in EU foreign policy allows individual member states such as Hungary to block collective action. In such cases, it is important for like-minded member states to coordinate and act jointly as much as possible. In specific situations, such as the current context in the Sahel, the Netherlands could take a more active role as a bridge-builder between different member states to help forge a shared position.

Multilateral reform. Although EU member states are individually represented in international organisations such as the United Nations, it is logical – especially in complex international discussions – for the EU to act jointly align positions closely. This also applies to the long-standing issue of UN Security Council reform, a complex and sensitive process that has been deadlocked for decades. Structural reform is unlikely to occur anytime soon, in part because permanent members like the US, China and Russia have little interest in change. Precisely for that reason, it is important that the EU and its member states explicitly advocate for reform and support the expansion of the Security Council to include permanent seats for countries such as India and Brazil, as well as backing the Ezulwini Consensus on African representation. At the same time, building consensus within Europe around coordinated European representation in the Security Council is also critical. This would help signal that the lack of reform due to opposition from other global players, not from Europe. In the international financial institutions, the Netherlands holds a special position as co-chair of a constituency group of 16 countries, including a number of EU member states but also non-EU countries such as Bosnia-Herzegovina, Montenegro, Ukraine, Georgia and Israel.

Broad frameworks and instruments. The EU plays an important role in establishing the broader conditions and frameworks for cooperation, such as trade agreements and legislation on due diligence and corporate social responsibility. These fall within EU competences, and access to the internal market remains a crucial asset - one of the main sources of Europe's global influence. In addition to comprehensive trade agreements, Europe must urgently prioritise the effective implementation of the various instruments discussed in Chapter 4, such as the Global Gateway, Critical Raw Material Partnerships and Clean Trade and Investment Partnerships.

The proliferation of initiatives – often launched with great ambitions, but failing to deliver tangible results at scale - is undermining the EU's credibility. Diplomats from the Global South, for example, frequently view the Global Gateway as a public relations exercise rather than a serious transformative effort, while others even view it with cynicism.⁹² This is a signal the Netherlands must take seriously. There is an urgent need for both the member states and the European Commission, to: (i) simplify procedures and improve coordination between different DGs; (ii) involve partners from the Global South earlier and more actively in design and selection of initiatives; (iii) involve and supporting the European private sector more effectively to follow through on investment ambitions; and (iv) create a more coherent European trade and industrial policy.

Soft power, information and cultural influence. The EU is lagging behind emerging powers such as China, Russia, the Gulf States and Türkiye in terms of strengthening interpersonal relations and leveraging cultural influence - areas in which these actors operate far more assertively. Some pursue aggressive strategies, including the deliberate spread of disinformation. In recent years, the EU has taken steps to counter Russian disinformation, particularly within the EU itself and in countries close to Russia – most notably through initiatives like EUvsDisinfo and the StratCom division of the EEAS. Since 2023, a StratCom division has also been established for Africa and China, but its scale and resources remain insufficient to meaningfully influence information flows. Beyond exposing disinformation, the EU should also invest structurally in independent and reliable news coverage in countries in the Global South, with particular attention to local languages and

digital media.⁹³ With the dismantling of USAID and the US Agency for Global Media, which were very active in this field, even larger gaps are now emerging.

In terms of long-term relationships through culture and education, the EU is also at risk of losing ground to emerging actors. China is now by far the largest provider of scholarships for African students and countries such as Türkiye and India are also expanding their education and exchange networks. The EU should significantly scale up the Erasmus Mundus scholarship programme and explore whether national scholarship schemes could also be brought under this shared label, while maintaining their own specific focus. This would allow Erasmus to evolve into a recognisable symbol of an EU that is open to the world and young people.

Besides academic exchanges, shorter reciprocal visits are also of great value for strengthening ties and influence. A key barrier, however, is the cumbersome and time-consuming visa process, with uncertain outcomes, which often discourages visitors from the Global South from attending conferences and exchanges in Europe. The issue is not so much about the entry criteria, and more about the poor service, long processing times and unpredictable decisions. These are a major source of frustration and contribute to a negative image of Europe among influential audiences in the Global South.⁹⁴

A small but telling example: a group of African invitees to the Venice Architecture Biennale could not attend the event because their visas were denied without clear explanation.⁹⁵ Such experiences are not uncommon among African entrepreneurs, scholars and artists. Moreover, Schengen visas are relatively expensive and fees are not refunded in case of rejection. The Netherlands should advocate in Brussels for a coordinated effort to improve service delivery and transparency in issuing short-stay Schengen visas for specific target groups.

5.3 Dutch policy

Individual EU member states, such as the Netherlands, have particular scope to take independent initiatives - or to join those of others - in thematic areas and relations that are shaped by an 'à la carte' dynamic (scenario 4). This is also where the comparative strength of the member states lies vis-à-vis the EU. While the EU carries greater weight, it can also be cumbersome and tends to move slowly, particularly outside of crisis situations. Member states, by contrast, can operate with greater agility and respond more swiftly, enabling them to participate more flexibly in a variety of coalitions.

Minilateral coalitions

This ability aligns with a broader trend already visible in international politics: the growing relevance of *minilateralism*. Instead of seeking universal or multilateral agreements, countries are increasingly opting for small-scale, flexible and targeted coalitions with like-minded partners on specific issues.

Examples of such minilateral cooperation abound. In the security domain, QUAD - a collaboration between Australia, India, Japan and the US - has become a key strategic actor in the Indo-Pacific. In the energy sector, France is experimenting with trilateral partnerships in which French companies, Gulf States (with large-scale investment funds) and African partners jointly invest in renewable energy projects and startups.⁹⁶ Another example is the Just Energy Transition Partnership (JETP) approach, in which groups of western countries cooperate with emerging economies such as South Africa, Senegal and Indonesia to provide coherent support for the energy transition and phaseout of coal dependence.

The Netherlands is already engaged in several minilateral initiatives, including the JETP with South Africa. At the intersection of political cooperation and conflict resolution, the Netherlands recently co-hosted, together with Morocco, a meeting of the Global Alliance for the Implementation of the Two-State Solution, focused on the Israeli-Palestinian conflict.⁹⁷

Given the changing world order, it would be prudent to give such initiatives a more prominent place in Dutch foreign policy. The Netherlands should not only seek to join such minilateral initiatives more frequently, but also take the lead more often in initiating targeted coalitions with like-minded partners. This approach can also be suitable in the area of trade facilitation, especially in light of increasingly complex supply chains involving multiple countries with distinct comparative advantages. Targeted cooperation in semiconductors or digital technologies, with South Korea on the one hand and Asian emerging economies such as India, Indonesia or Thailand on the other, could result in new investments and trade relations. Other low- or middle-income countries such as Bangladesh or Sri Lanka could also be involved, supporting them as a coalition in taking the initial steps into digital technology-driven value chains. In this way, minilateralism can also contribute to inclusive economic development.

This brings us to the instrument of development cooperation. For countries in the Global South that have not yet experienced sustained economic take-off, development assistance (ODA) remains of great importance. Most of these countries are also severely affected by climate change, while lacking the resources to adapt to its impacts. Challenges around poverty, climate vulnerability, weak governance and political tensions often converge in these contexts, resulting in fragility - with direct consequences for Dutch interests in areas such as migration and security. Beyond these direct interests, the Netherlands should also remain committed to addressing these issues out of a sense of solidarity. Especially if Europe seeks to reposition itself vis-à-vis the Global South as a credible partner for a fair and just global order – one that serves Dutch interests - then a high-income country like the Netherlands must show solidarity with the world's poorest and most vulnerable nations.

For these reasons, it is important that the Netherlands honours its commitments on development finance (0.7% of GNI) and climate finance. At the same time, the instrument of development cooperation must urgently evolve, to adapt to the changing world order. The hierarchical donor-recipient model of the past is outdated. The trend towards localisation - whereby more funding is channelled directly to local organisations – has started, but must be accelerated. Multilateral institutions also remain indispensable as effective partners in supporting the least-developed countries. This includes, for example, contributions to the International Development Association (IDA), the concessional arm of the World Bank, which provides grants and interest-free loans to support long-term sustainable development.

The concept of minilateralism may also offer new opportunities to deploy ODA funds in innovative ways that reflect today's geopolitical realities. The Netherlands could combine trade, geopolitics, knowledge and development cooperation in novel configurations, thereby building new relationships based on trust, not only between governments but also among companies, universities and other societal actors. By taking the lead on specific themes in strategically chosen countries, the Netherlands could play a bridging role in South-North-South cooperation. The emphasis would lie on shared and mutual interests, building on recommendations from the WRR report on the fragmenting world order.⁹⁸ The text box below presents a number of potential minilateral coalitions, not as direct recommendations, but as illustrations of the kinds of partnerships that could be envisioned.

Opportunities for minilateral cooperation

Water - Food - Health

This cluster is suitable for complementary cooperation, bringing together Dutch expertise, the practical experience of middle-income countries and the needs of low-income countries. It aligns with the February 2025 policy note on Dutch development assistance, which identifies these topics as priorities. In the field of health - also a priority area within Dutch innovation policy - a coalition could be formed, for instance, with India (a leading pharmaceutical producer), Senegal (an African frontrunner with the Pasteur Institute) and a country with high health needs, such as Nigeria. In the area of water management, including flood risk reduction and improvements in water purification, cooperation between the Netherlands, Bangladesh, Mozambique and small island states vulnerable to rising sea levels, could be a fruitful endeavour.

Raw Materials - Technology

This area offers significant potential for minilateral partnerships focused on sustainable resource extraction and processing. Indonesia and South Africa have both mineral resources and experience in local processing. Poorer countries such as DR Congo, Tanzania or Ghana also have abundant natural resources, but much less institutional experience and capacity to build local clusters that deliver greater benefits to the economy and society. A broader coalition could include a country like Sweden, with expertise in sustainable mining technology. The Netherlands could add value with logistics expertise, for instance in ports, transport corridors or efficient customs systems.

Reconstruction - Security - Migration

Post-conflict areas are often still fragile and carry risks, but also offer opportunities for lasting impact. Strategic 'quick win' efforts can help create momentum for additional investments. In the current context of Syria, for example, efforts to accelerate reconstruction should be intensified. The Netherlands could collaborate with Qatar (with strong financial muscle) and Türkiye (with extensive regional networks and experience in the construction sector). Using ODA funds, the Netherlands could both support economic opportunities and enable the Syrian diaspora in the Netherlands to contribute to reconstruction - thereby also facilitating conditions for return migration.

Selection of a limited number of strategic partners

At the same time, it would be strategically important for the Netherlands to complement its engagement in flexible coalitions with sustained investment in a number of reliable anchor points in the Global South - by building broad, long-term relationships with carefully selected countries. Given its limited size, the Netherlands is unlikely to play a central role as a priority partner in countries like India or Brazil, where competition for influence is intense. The Netherlands could more feasibly grow into such a role in countries just below that tier - provided it invests in reciprocal relationships, visible presence and long-term cooperation. To help guide such choices, the AIV has developed a simple model in which countries are ranked according to a number of relevant criteria (see box below). This is by no means intended to be a rigid assessment framework, but rather as a tool to support strategic thinking on potential partner countries.

Criteria for selecting strategic partners in the Global South (see annex on page 61 for more details).

- a) Population size comparable to that of the Netherlands. The closer the population size is to that of the Netherlands, the higher the score.
- b) Overall size of the economy comparable to that of the Netherlands (on PPP basis). As the Dutch economy is relatively large, this gives additional weight to southern countries with significant potential for trade and economic cooperation.
- c) Degree of democratisation, based on Economist Intelligence Unit (EIU) *Democracy Index*. This is important to consider, to support democratisation, but also because cooperation with democracies is generally easier for Dutch actors.
- d) Respect for international law and human rights, based on the *Civil Liberties Index* compiled by V-Dem of the University of Gothenburg. This is important to consider, to support the international rule of law and human rights, but also because cooperation with countries where human rights are under pressure carries inherent risks.
- e) Historical and personal ties with the Netherlands, based on Statistics Netherlands (CBS) data on diaspora communities in the Netherlands.
- f) Access to critical raw materials, based on the EU's *Critical Raw Materials* report, containing data on the distribution of resource reserves.
- g) Low GDP/capita. This is relevant in order to ensure that the poorest and most fragile parts of the Global South are not left behind, in the spirit of solidarity.

When applying equal weighting to these seven criteria, the top ten countries are as follows: 1) South Africa; 2) Chile; 3) Morocco; 4) India; 5) Peru; 6) Ghana; 7) Indonesia; 8) Argentina; 9) Suriname; 10) Malaysia.

It is noteworthy that five of the 14 combination countries⁹⁹ of Dutch foreign policy (see Chapter 4) can be found in this list (India, Ghana, Morocco, Indonesia and South Africa). Two other countries, Senegal and Colombia, rank just below. If overall population size is weighted on its own (rather than similarity to the Dutch population size), Bangladesh and Nigeria enter the top ten, two countries that are also included among combination countries. In short, the 14 combination countries appear to be well chosen and provide a solid basis for deepening partnerships with the Global South.

The Netherlands could make a more targeted selection from the longer list of potential core partners. In doing so, it would be important to include additional criteria, such as historical relations (for example, in the field of development cooperation), trade relations, geographic proximity or the extent of shared challenges, such as similar climate risks. The degree of interest from the respective countries in deepening relations with the Netherlands also warrants explicit consideration. Based on these factors, a solid foundation can be laid for sustainable and reciprocal partnerships.

In the countries ultimately selected, Dutch embassies could initiate a broad, multi-year dialogue with representatives from government, civil society and private sector, aimed at exploring and strengthening cooperation in multiple areas. At the same time, the Ministry of Foreign Affairs should actively involve other Dutch stakeholders - including other ministries, municipalities, companies and knowledge institutions - and encourage them to explore long-term relationships with counterparts in the respective countries. In this way, a critical mass could emerge, making the partnership become more than just diplomacy, development cooperation or trade. Embassies should be provided with additional resources and staff to provide flexible support to this process and to effective leaders in different sectors, based on locally defined priorities.¹⁰⁰

Continued investment in knowledge and networks

Finally, the AIV wishes to reiterate the importance of knowledge and networks. As argued throughout this report, effective and sustainable international partnerships ultimately depend on strong interpersonal ties.¹⁰¹ At a time of increasing geopolitical turbulence and a growing need for deeper engagement with the Global South, it would be unwise to make substantial cuts to three vital channels which, in the broader scheme, are relatively inexpensive, but contribute significantly to mutual understanding and stronger relations.

First, scholarship programmes such as the recently discontinued Orange Knowledge Programme are of great value, generating considerable goodwill and long-lasting personal and professional connections with individuals who often go on to hold influential positions. The government should move swiftly to establish a successor programme and actively promote greater alignment and consolidation of European scholarship schemes under a joint Erasmus umbrella. Within such a framework, sufficient space should be created for joint applied research, as this offers an especially effective way to strengthen ties through the development of practice-oriented knowledge. The European EU-India Think Tank Twinning Initiative provides a useful example.

Second, sustained investment in knowledge of the history, languages, cultures and economies of regions in the Global South is essential. Recent budget cuts are affecting faculties and programmes that have long built up deep regional expertise. This could hinder the training of future leaders in government, business and civil society with the in-depth regional knowledge that effective engagement requires.

Third, the diplomatic network plays a key role in maintaining and deepening political, economic and cultural relations with countries in the Global South. Any revisions to the diplomatic network must be closely coordinated with other EU member states. In this light, the closure of embassies in Burundi and South Sudan raises questions as these are countries with a very limited European diplomatic presence. Precisely in such contexts, Dutch representation could offer substantial added value for strengthening broader European engagement.



International master's students during an introduction week at Eindhoven University of Technology. European knowledge institutions play a key role in relations with the Global South through scholarships, exchange programmes, and partnerships with universities. In the Netherlands alone, approximately 123,000 international students were enrolled in 2022–2023, more than 20 percent of whom came from outside Europe — particularly from countries such as India, Indonesia, and Nigeria. These educational ties are more than merely instrumental: they contribute to capacity building, reciprocal knowledge networks, and the development of shared frames of reference.

Annex - Details on selection criteria for strategic partners

The AIV has developed a simple model in which countries are ranked according to a number of relevant criteria, which can help guide the selection of possible strategic partners. For the criteria a-f, the data sources and methods of weighting are provided below.

This model is by no means intended to be a rigid framework for decision-making, but rather as a tool to support strategic thinking about potential partnerships. For the final selection, it is important to also take into account considerations such as historical ties (e.g. in the field of development cooperation), trade relations, geographic proximity or the extent of shared challenges, such as similar climate risks. The degree of interest from the prospective partner in deepening relations with the Netherlands also warrants close attention. Based on these considerations, a solid foundation can be laid for durable and mutually beneficial partnerships.

a) Population comparable to the Netherlands:

Population size relative to that of the Netherlands. The closer to the Dutch population, the higher the score, using a normalised scale based on a difference of 100 million people. So a difference of 10 million more or less results in a score of 0.9. A difference of 90 million results in a score of 0.1. A difference of 100 million or more yields a score of 0. Highest scores: Ecuador, Senegal, Guatemala, Somalia.

b) Gross domestic product comparable to the Netherlands

Size of the economy (in PPP purchasing power parity) relative to the Dutch economy. Countries with an economy that is 50% or 150% the size of the Dutch economy, receive a score of 0.5. Countries with an economy more than twice the size of the Dutch economy receive a score of 0. Highest scores: Vietnam, Argentina, Nigeria, Bangladesh, Pakistan.

c) Democratisation

Based on the Democracy Index of the Economist Intelligence Unit.¹⁰² Normalised based on the highest score in the Global South (Uruguay with a score of 8.67). Uruguay receives a score of 1; all other countries are scored in proportion. Highest scores: Uruguay, Costa Rica, Mauritius, Chile, Botswana, Cape Verde.

d) Human rights

Based on the Civil Liberties Index compiled by V-Dem of the University of Gothenburg.¹⁰³ Normalised based on the highest score in the Global South (Costa Rica with a score of 0.93). Countries with 0.93 get a score of 1; the rest are scored in proportion. Highest scores: Costa Rica, Chile, Uruguay, Cape Verde, Barbados.

e) Diaspora in the Netherlands

Used as an indicator of historical and human ties with countries. Based on CBS data, via CBS Statline. Normalised so that countries with a diaspora in the Netherlands of more than 75,000 receive a score of 1. All other countries are scored in proportion. Highest scores: Türkiye, Morocco, Suriname, Indonesia, Syria, China.

f) Raw materials

Based on the 2023 EU report Critical Raw Materials.¹⁰⁴ Proxy indicator compiled from Annex 7, which details the estimated global reserves of various CRMs by country. For countries in the Global South, all those percentages were summed up and then normalised. Countries

with a cumulative score above 100 receive a score of 1. All others are scored in proportion. Highest scores: China, Brazil, Türkiye , India, South Africa, Indonesia, DR Congo, Mexico, Myanmar.

g) Low GDP/capita

Used as an indicator to incorporate solidarity, giving higher scores to the poorest countries. Normalised whereby countries with a GDP/capita of more than \$20,000/year receive a score of 0. All countries with a GDP/capita below 20,000 are scaled in proportion to that level. Highest scores: South Sudan, Yemen, Eritrea, Burundi.

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List of abbreviations

ANC	African National Congress
ASEAN	Association of Southeast Asian Nations
BRI	Belt and Road Initiative
BRICS	Brazil, Russia, India, China & South Africa
CBAM	Carbon Border Adjustment Mechanism
CDU	Christian Democratic Union of Germany
CRM	Critical Raw Materials
DG	Directorate-General
DRC	Democratic Republic of Congo
EBA	Everything But Arms
ECFR	European Council on Foreign Relations
EEAS	European External Action Service
EIU	Economist Intelligence Unit
GNI	Gross National Income
ICCPR	Covenant on Civil and Political Rights
ICESCR	International Covenant on Economic, Social and Cultural Rights
IDA	International Development Association
IMF	International Monetary Fund
IOB	Directorate of International Research and Policy Evaluation, Ministry of Foreign Affairs
IPCEI	Important Projects of Common European Interest
JETP	Just Energy Transition Partnership
ODA	Official Development Assistance
OECD	Organisation for Economic Cooperation and Development
PPP	Purchasing Power Parity
RVO	Netherlands Enterprise Agency
SCO	Shanghai Cooperation Organisation
SDG	Sustainable Development Goals
SDR	Special Drawing Rights
SPD	Social Democratic Party of Germany
STEM	Science, Technology, Engineering and Mathematics
SWIFT	Society for Worldwide Interbank Financial Telecommunication
UK	United Kingdom
UNCTAD	United Nations Conference on Trade and Development
USAID	United States Agency for International Development
UAE	United Arab Emirates
UN	United Nations
WHO	World Health Organisation
WRR	Netherlands Scientific Council for Government Policy
WTO	World Trade Organisation

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