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Original Article

Rise of the BRICS and the Global South: Challenge to the Western-Led Order

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Abstract:

Since the early 2000s, the BRICS grouping has grown from an investment-bank acronym into a leaders' forum, a development bank and an expanding club of emerging and developing countries, while the idea of the 'Global South' has returned to the language of world politics. This paper asks whether the BRICS challenges the Western-led international order and, if so, in what way. It builds a three-part test of institutions, norms and power, using theories of liberal order, power transition and soft balancing, and applies it to secondary evidence on the grouping's evolution, its expansion in 2024 and 2025, its financial institutions and its economic weight. The paper finds that the BRICS is a reformist and not a revolutionary actor: it gains in collective voice and in the number of its members, and it offers alternatives in finance and diplomacy, but it lacks the cohesion, institutional depth and common vision needed to replace existing arrangements. For India, the grouping is most useful as one forum among several for strategic autonomy and for speaking on behalf of the Global South.

Keywords: *BRICS, Global South, international order, multipolarity, India, soft balancing, etc.*

Introduction:

The international order that took shape after 1945 was built around institutions designed largely by the United States and its allies: the United Nations, the International Monetary Fund, the World Bank and later the World Trade Organization. For several decades this order was seen as both a product and a guarantor of Western leadership. The rapid growth of large developing economies, the financial crisis of 2008, and the strain on Western societies since then have changed that picture. Countries such as China, India, Brazil and Indonesia now hold a larger share of world output and population, and they want a greater say in how global rules are made.

The BRICS grouping is the best known expression of this change. The acronym was coined by the economist Jim O'Neill (2001) to describe four large emerging markets, but it has since become a political forum. In 2024 and 2025 the grouping expanded from five to ten members, and at the same time the term 'Global South' has come back into common use, as a name for the large and varied group of countries that were once called the Third World or the developing world. The central question of this paper is whether the BRICS, as the main vehicle of this collective ambition, presents a real challenge to the Western-led order.

The paper makes three arguments. First, the challenge is real but limited: the BRICS wants to reform the order from within, in order to gain more voice, rather than to replace it. Second, the strongest evidence of change lies in the realm of ideas and legitimacy, in the claim that the Global South has an equal right to shape global rules, and not in institutions or military power. Third, the grouping's internal differences, including the weight of China and the rivalries among members, set firm limits on what it can do. The paper concludes with implications for India, a member that is also a close partner of Western states.

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Review of Literature:

Three strands of scholarship frame the discussion. The first concerns the nature of the liberal order. Ikenberry (2011) argues that the order built under American leadership was open and rule-based enough that rising states have reason to join it rather than overthrow it. Keohane (1984) holds that institutions can continue to deliver cooperation even after the hegemon's relative power declines. Mearsheimer (2019), in contrast, argues that the liberal order was always a product of a particular distribution of power and was likely to weaken as that distribution changed. These views give different expectations for the BRICS: Ikenberry's suggests that the grouping will seek inclusion, while Mearsheimer's suggests that it will seek a new order shaped by its own interests.

The second strand concerns power transitions and balancing. Organski (1958) argued that conflict is most likely when a rising power is dissatisfied with the existing order. Waltz (1979) expected states to balance against the strongest power. Pape (2005) and He (2008) described softer forms of balancing, in which states use diplomacy, coalitions and institutions, not military alliances, to limit a stronger state's freedom of action. Hurrell (2006) and Narlikar (2013) discussed how would-be great powers bargain with the established order and with one another, noting that they often cooperate on specific issues while they compete in others. These ideas are useful because the BRICS has no military alliance but is an obvious setting for institutional and diplomatic balancing.

The third strand concerns the BRICS and the Global South directly. Stuenkel (2015) presents the BRICS as a significant if imperfect actor in global governance, valuable as a platform for coordination among states that had little contact before. Acharya (2014) proposes that the world is moving toward a 'multiplex' order, with no single leader, in which many actors and regions share influence. Dados and Connell (2012) trace the idea of the Global South to the shared experience of colonialism and unequal development, and note that it is used with different meanings by different speakers. This paper builds on these works and tests their claims against recent developments, especially the expansion of the grouping.

A further point in the literature concerns the meaning of 'order'. Writers differ on whether the post-war order should be understood as a set of institutions, a set of rules and norms, or a hierarchy of power with the United States at the top. The answer matters, because a challenge to one of these does not necessarily challenge the others. A group could, for example, demand reform of institutions while accepting the rules of open trade, or could reject Western leadership while using Western-built institutions. The BRICS appears to fit this pattern of selective challenge, and the framework in the next section is designed to capture it by separating the institutional, normative and power dimensions.

Analytical Framework and Method :

To judge whether the BRICS challenges the existing order, the paper uses a three-part test. The first part is institutional: does the grouping create organisations and mechanisms that compete with or reduce reliance on those of the West? The second is normative: does it present a different set of principles about sovereignty, development and global governance, and do these gain support beyond the membership? The third concerns power: does the grouping have the combined economic and political weight to change outcomes, and is it united enough to use it? A strong challenge would score high on all three; a reformist or symbolic challenge would score high on some and low on others.

The study is qualitative and relies on secondary evidence. The main sources are the Banque de France analysis of the expansion by Afota et al. (2024), which supplies comparative economic data from IMF projections, reporting of the 2025 Rio de Janeiro summit (Tribune India, 2025), and the scholarly literature listed above. Where figures are drawn from these sources they are reported as published, and their limits, such as dependence on projections, are noted. The paper does not attempt to measure the grouping's influence statistically.

Evolution of the BRICS :

The term BRIC first appeared in a report by O'Neill (2001), who argued that Brazil, Russia, India and China would become a larger part of the world economy. The four governments then began to meet. Their first leaders' summit took place in Yekaterinburg in 2009, and South Africa joined in 2010, turning BRIC into BRICS and bringing an African country into the group. In the following years the members agreed on common positions on the reform of international financial institutions, trade, climate and sovereignty, and began regular summits, sectoral ministerial meetings and a growing calendar of working groups.

A major step was the decision at the 2014 Fortaleza summit to create the New Development Bank (NDB), with its headquarters in Shanghai, and a Contingent Reserve Arrangement, a pooled fund of about 100 billion US dollars meant to help members facing balance-of-payments pressure. The NDB finances infrastructure and sustainable development projects in emerging economies and has since admitted additional members. These institutions are small compared to the World Bank and the IMF, but they were the first multilateral

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financial bodies created by emerging powers and run on terms that give borrowers a larger voice.

The next major change came with expansion. At the Johannesburg summit in 2023, the group invited six countries to join. Argentina later declined after a change of government, while Egypt, Ethiopia, Iran and the United Arab Emirates became members on 1 January 2024. Saudi Arabia was also invited, but it does not appear among the full members named in the reporting on the 2025 Rio de Janeiro summit. Indonesia was welcomed as a full member in January 2025, and at Rio ten further countries, namely Belarus, Bolivia, Kazakhstan, Cuba, Nigeria, Malaysia, Thailand, Vietnam, Uganda and Uzbekistan, were named partner countries (Tribune India, 2025). Table 1 lists the full members.

Table 1: Full members of the BRICS, 2025

Group	Members	Year of joining
Founding members	Brazil, Russia, India, China	2009 (first summit)
First addition	South Africa	2010
Expansion of 2024	Egypt, Ethiopia, Iran, United Arab Emirates	1 January 2024
Expansion of 2025	Indonesia	January 2025

Source: Compiled from Afota et al. (2024) and Tribune India (2025).

The Global South and the BRICS

The expansion has made the claim to speak for the Global South more prominent. The term is used for countries of Asia, Africa and Latin America that share a history of colonial rule or economic dependence and a present interest in more equal international rules (Dados & Connell, 2012). It has no strict definition: it includes China, now the second largest economy in the world, as well as some of the poorest countries, and it is used differently by different governments. Yet this flexibility explains its appeal. It gives states with very different incomes and political systems a common identity based on fairness, and it allows them to present their demands as claims of justice, not simply of national interest.

Several developments show that the idea has weight. The Banque de France analysis notes that the expansion mainly signals the grouping's attraction to emerging and developing countries, which see it as a forum for the Global South (Afota et al., 2024). India, for its part, convened a Voice of the Global South Summit in 2023 and, as chair of the G20 in 2023, secured the admission of the African Union as a permanent member, which shows that the Global South agenda is pursued in several forums and not only the BRICS. At the Rio summit of 2025, leaders endorsed a framework declaration on climate finance and a statement on the global governance of artificial intelligence, and the Indian Prime Minister called for the reform of the United Nations Security Council, the World Trade Organization and multilateral development banks (Tribune India, 2025). These themes, climate finance, technology governance and institutional reform, are exactly the points on which developing countries say the present order is unequal.

Economic Weight and the Test of Power :

The economic case for the BRICS is strong. The Banque de France analysis reports that, measured at purchasing power parity, the original five accounted for 31.6 per cent of world GDP in 2022, and the enlarged group for 35.6 per cent. The IMF projects that the enlarged group will reach 37.6 per cent by 2027, against 28.2 per cent for the G7. The expanded BRICS accounts for about 46 per cent of the world's population, compared with 41 per cent for the original five and just under 10 per cent for the G7 (Afota et al., 2024). Table 2 summarises these figures.

Table 2: BRICS and G7 compared (per cent of world total)

Indicator	BRICS (original five)	BRICS+ (enlarged)	G7
Share of world GDP at PPP, 2022	31.6	35.6	Not reported in source
Share of world GDP at PPP, 2027 (IMF projection)	Not reported in source	37.6	28.2
Share of world population	41	46	Just under 10

Source: Afota et al. (2024), Banque de France Bulletin 250, based on IMF data.

These numbers must be read with care. PPP shares tend to give more weight to large, lower-income economies than market exchange rates do. The projection for 2027 is only a forecast. Most importantly, the same source notes that China makes up 52 per cent of the enlarged group's GDP at PPP, a share similar to that of the United States within the G7 (Afota et al., 2024). The BRICS is thus less balanced than its numbers suggest: one member supplies about half of its output, and the group's apparent plurality hides an unequal structure. The authors also conclude that the members' diversity and the low level of trade among them limit the group's ability to influence

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world trade and the international monetary system. In the language of the power test, the BRICS has large numbers but modest cohesion.

Does the BRICS Challenge the Western-Led Order? :

Applying the three-part test gives a mixed result. On the institutional test, the NDB and the Contingent Reserve Arrangement are real achievements, but they are small and complementary rather than competing. They lend on a modest scale, mostly cooperate with existing banks, and cannot yet replace the IMF's role as a lender of last resort. Discussion of payment systems and settlement in local currencies shows interest in reducing dependence on the US dollar, but the evidence reviewed here does not show a serious alternative to the existing monetary system. Institutionally, the BRICS is a supplement to the order and a hedge against it, not a rival.

On the normative test, the challenge is stronger. The members share an emphasis on sovereignty, non-interference and a 'more democratic' multilateralism, and they argue that the Security Council, the IMF and the World Bank do not reflect the present distribution of power. The enlargement of the group and the number of countries seeking partner status show that this message has an audience. But the members do not agree on what the alternative should be. India and Brazil seek reform and a permanent seat for themselves in the Security Council; China and Russia emphasise opposition to what they call Western dominance; others join mainly to gain bargaining leverage. As Hurrell (2006) and Narlikar (2013) suggest, rising powers often cooperate on rules they want changed while competing with each other for influence.

On the power test, the evidence shows combined weight but weak unity. The group's share of world output and population is large, and it can take diplomatic positions that carry weight. However, it also contains deep rivalries. India and China have a long-standing border dispute and compete for influence in Asia. Egypt and Ethiopia disagree over the Nile waters, and Iran and the United Arab Emirates have had tense relations in the Gulf. Decisions are made by consensus, which in practice means that the grouping can say little that offends any member. This explains why BRICS statements usually call for reform and cooperation but rarely commit members to specific actions against the existing order.

Seen through the theories reviewed earlier, the BRICS is best described as an example of soft and institutional balancing in a multiplex order. It does not follow Mearsheimer's (2019) expectation of a clean break, since its largest members still trade with the West and join its institutions. It also does not fit Ikenberry's (2011) expectation of simple inclusion, because its members are building parallel forums that reduce their dependence on Western goodwill. It resembles instead what Acharya (2014) describes: a world in which several overlapping groupings share influence, and no one actor sets all the rules.

The test also suggests what to watch in future. A deeper challenge would be visible in five indicators. The first is the lending volume and membership of the NDB, and whether it begins to finance projects on a scale that affects the pattern of global development finance. The second is the actual use of local currencies in trade and payments among members, as distinct from statements of intent. The third is the voting record of members in the United Nations General Assembly and the Security Council, which would show whether the group acts together when its interests are tested. The fourth is the group's ability to settle disputes among members, and the fifth is the way existing institutions respond, whether by granting greater voice or by resisting. Weak movement on these indicators would confirm the reformist reading offered in this paper, while strong movement would support a more radical interpretation.

Table 3: The three-part test applied to the BRICS

Test	Evidence of challenge	Limits	Overall
Institutions	New Development Bank; Contingent Reserve Arrangement; talk of local-currency settlement	Small scale; works alongside the World Bank and IMF	Supplement and hedge
Norms	Claim for equal voice; calls for reform of the UN Security Council, WTO and development banks	No agreed alternative; members hold different goals	Strong claim, weak agreement
Power	Large share of world output and population; expanding membership	China holds 52 per cent of GDP; rivalries; consensus rule	Large but divided

Source: Compiled by the author from the analysis in Sections 4 to 7.

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Why States Join: Hedging and Multi-alignment :

To understand the pull of the BRICS it is useful to ask why states join or seek partner status. For some, the motive is voice: a seat at a table where their concerns are treated as equal to those of larger powers. For others it is access to finance, since the NDB lends to members on terms that may be less demanding than those of Western-dominated lenders. A third motive is hedging. A state that depends on Western markets or security guarantees may still wish to show that it has other options, and membership of a forum that includes China and Russia is a low-cost way of doing so. Hedging of this kind is a form of the soft balancing described by Pape (2005): it does not break with the leading power, but it limits the freedom with which that power can set terms.

The wide range of states that now seek association with the grouping supports this reading. The partner countries named at Rio differ greatly in their political systems and alignments, from Belarus and Cuba to Malaysia, Thailand and Vietnam, and from Nigeria and Uganda to Kazakhstan and Uzbekistan (Tribune India, 2025). Many of them keep close ties with the United States or Europe. Their interest is better understood as multi-alignment, the practice of keeping several partnerships open, than as a decision to side with one camp against another. This helps explain why the group can expand quickly, since joining carries few binding obligations, and also why its coherence may weaken as it grows.

The Western-led order is itself not a single bloc. The established powers disagree on trade, climate and relations with China, and the order's institutions have already adjusted to some degree, for example by raising the voting share of emerging economies in the IMF and by enlarging the G20 as a leaders' forum. The BRICS is therefore not facing a fixed opponent. It operates in a changing environment where the old order is adapting, partly in response to pressure from rising states. Whether this adaptation is fast enough to satisfy the demand for voice is the main open question, and the answer will largely determine how far the BRICS moves from reform to rivalry.

Implications for India:

India's position in the BRICS is distinctive. It is a founding member and a leading voice of the Global South, but it also holds close strategic partnerships with the United States, Japan and Australia through the Quad and with European countries. Indian policy-makers describe this as strategic autonomy: the freedom to deal with many partners without joining a bloc. In this setting the BRICS gives India three benefits. It offers a platform to press for reform of global institutions with partners that share the demand. It provides a forum for dealing directly with China and Russia, and it widens India's links with Africa, West Asia and Southeast Asia.

It also carries risks. A BRICS that is seen as anti-Western could reduce India's room for manoeuvre with its Western partners, while a BRICS dominated by China could weaken India's own claim to leadership of the Global South. India's interest therefore lies in keeping the grouping's agenda broad and focused on reform, development finance, climate, technology and health, and in resisting attempts to turn it into a military or ideological bloc. The expansion complicates this task, since a larger group is harder to steer and more likely to include members with different agendas.

Findings:

Four findings emerge. First, the BRICS has changed from a label for investors into a political forum with institutions, a regular summit cycle and a growing membership, and this is a significant development in the diplomacy of the Global South. Second, its challenge to the Western-led order is reformist: it seeks a larger voice, new sources of finance and recognition of a multipolar world, but it keeps working within the existing system. Third, its economic weight is large, but concentrated in China, and its internal rivalries and low mutual trade limit its power. Fourth, the Global South idea is stronger as a source of legitimacy than as an organising structure, and it is promoted through several forums at once, of which the BRICS is only one.

Limitations and Scope for Further Research:

The paper relies on secondary sources and on a small number of recent reports, and some of the figures are projections. It does not study the voting behaviour of members in the United Nations or the lending record of the NDB in detail, both of which would provide firmer evidence of cohesion and institutional weight. Because events of 2025 and after are still unfolding, statements about the new members and partners may need updating. Future work could compare the BRICS with other Global South groupings, such as the G77 and the Non-Aligned Movement, or use voting data to measure the unity of the enlarged group.

Conclusion:

The rise of the BRICS reflects a real shift in the distribution of economic weight and in the demand for a say in global governance. Its expansion in 2024 and 2025 and its claim to represent the Global South have made it a visible symbol of that shift. Yet the evidence indicates that it challenges the Western-led order mainly by pressing for reform and by creating options, and

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not by building a replacement. Its institutions are small, its members are divided and its largest member dominates its economic weight. The more accurate picture is of an order in transition, in which established powers keep many advantages and emerging powers gain space through overlapping forums. For India and for other members, the task is to use the BRICS to widen choices and to strengthen the voice of developing countries, without allowing it to harden into a bloc that narrows them.

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Conflicts of interest

The authors declare that there are no conflicts of interest regarding the publication of thesis paper.

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