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# The BRICS, a geopolitical challenge overlooked by the European Union

Over the last five years, geopolitical considerations have taken an unprecedented place on the European Union's agenda. Its foreign policy, long in its fledgling stages, is finally beginning to take shape, even if it is still subject to the unanimous decisions of its Member States. The days when trade policy was the only real lever for European foreign policy are over. The increasing bluntness of international relations is obviously no surprise to Europe's still tentative geopolitical awakening. The European Union's foreign policy has many potentially dangerous blind spots.

One of the most striking of these 'omissions' concerns the BRICS and their rapid development over the last three years. [Launched in 2009](#), this informal forum of four major emerging countries (Brazil, Russia, India and China), which was enlarged to include South Africa in 2011 and now includes ten countries, still seems to escape the attention of the European Union. Over the last fifteen years, official European Union documents dealing with this grouping can be counted on the fingers of one hand. More descriptive than analytical, they are a long way from outlining a European position on this significant group of countries.

## OVERSIGHT, DENIAL OR MISSING COMPETENCE?

As is often the case when it comes to the European unthinkable, these three dimensions tend to overlap. Foreign policy, introduced by the Treaty of Maastricht and strengthened

by the Treaty of Lisbon, is only an additional competence of the European Union. The [European External Action Service](#) introduced in 2011 has to contend with the lion's share of responsibility in this area devolved to the Member States. The unanimity rule that continues to prevail often leads European authorities – when they manage to do so – to produce roadmaps that are so lacklustre that they leave each country a great deal of latitude in implementing them.

When it comes to the BRICS specifically, it has to be said that the European institutions do not have much help: the European Union's main chancelleries remain just as silent as they are on the subject, merely highlighting the bilateral relations they have with each of the countries that make up this grouping, without defining a clear position on it. While behind the scenes, some are beginning to worry about the creation of a bloc that wants to embody a "global South", European rhetoric is generally reassuring: the BRICS do not seem likely to affect the policies that the European Union has patiently weaved through [treaties of free trade](#), strategic agreements with countries in the South, [aid and support policies](#) for sustainable development. The increasingly scathing criticism of the West voiced by some BRICS is being interpreted above all as an affirmation of their distrust of the United States. Indeed, many Europeans do not consider their demands for a rebalancing of governance within the United Nations, the International Monetary Fund and the World Bank to be illegitimate. In short, there is no

need to fear for the future, and the challenges posed by the BRICS are "*a source of opportunities for Europe*".

### **A COMPOSITE ENSEMBLE AND TOO RAPID AN EXPANSION?**

Since its inception, the European Union has been plagued by questions regarding its enlargement and deepening, and the question of which of these two options should be given priority. The announcement, in August 2023, that six new countries would be joining the BRICS was therefore bound to remind Europe of its own dilemmas. A sign of undeniable momentum (especially as there were dozens of candidates for membership), this sudden enlargement seems to have opened the path to as many doubts as certainties regarding the viability of the operation.

And so, the BRICS, which in their initial version already appeared rather disparate and modest in terms of the objectives and resources pooled, now appear even more heterogeneous in their extended version. Given their internal disparity the [BRICS+](#) can no longer be described as a "*club*" of major emerging economies. Their differences in terms of political regimes and diplomatic orientations are more marked than ever before. What do authoritarian regimes bordering on dictatorship, such as Russia, Iran and China, whose aim is to overturn the current world order, have in common with feudal regimes such as Saudi Arabia and the United Arab Emirates, and more or less advanced democracies such as India, Brazil and South Africa, which have no intention of breaking with the West? The deep-seated rivalries between certain members — such as India and China — are compounded by bilateral tensions between new members such as Egypt and Ethiopia or, to a lesser extent, Saudi Arabia and the United Arab Emirates. Argentina's decision, despite being accepted as a member of the club, to not [join the BRICS after all, in the wake of the election of Javier Milei](#) as president of the country illustrates the difficulties inherent in a coalition combining long-term authoritarian states with more volatile democratic regimes.

### **A VERY MODEST ECONOMIC RECORD**

It has to be said that in spite of [a statistically impressive effect of size](#) (46 % of the world's population, a third of the planet's land area and 37% of global GDP), the BRICS+, as an association, is hardly dazzling when it comes to bringing their economies and development models closer together. They are a long way from constituting a bloc with an endogenous dynamic that would allow them to set themselves up as a genuine rival to the G7 or the OECD. And with good reason: unlike the period of the Cold War, which was characterised by a clear division between West and East, all the major players on the planet continue, despite an increasingly obvious North-South dialectic, to operate in an environment of extreme interpenetration between economies. Apart from the annual summits organised on a rotating basis by one of the members, the BRICS have hardly any permanent instruments for joint governance. The only real institution attached to it is the [New Development Bank](#) (NDB), created in 2015, which is headquartered in Shanghai and has been chaired by Brazil's Dilma Rousseff since March 2023. This young institution, which aims to be an alternative to the IMF in terms of financing sustainable infrastructure in developing countries, had eight members before the expansion of the BRICS. Welcomed with interest and goodwill by the Europeans, its success remains mixed, and it is struggling to establish itself against the [Asian Infrastructure Investment Bank](#) (AIIB) or to the bilateral financing agreements promoted by China as part of the "[Belt and road initiatives](#)". But above all, the [NDB is experiencing a veritable crisis in terms of raising funds](#) with Western investors since the war in Ukraine and the sanctions imposed on Russia. China's current economic difficulties provide little incentive for it to bail out NDB, and it is too early to say whether Saudi Arabia and the United Arab Emirates will risk investing heavily in the bank.

### **AN INFORMALITY THAT IS MORE STRUCTURING THAN IT MIGHT SEEM**

From an organisational and political point of view, the BRICS group appears even more elusive. It has

no headquarters, no permanent secretariat and even less of a treaty governing its operation and or the establishment of common guidelines. Rather than being a weakness, its informal nature is deliberate and even constitutes an asset that facilitates its expansion and its appeal to third countries. Plural by definition, this forum refuses to make choices that would be binding on all its members, and it clearly has no intention of evolving into a kind of economic or political confederation. In their [joint declaration in Johannesburg](#) on 23 August 2023, the so-called BRICS countries declared that they considered "*the UN to be the cornerstone of the international system*" and expressed "*their attachment to multilateralism and international law*". They limit themselves — officially — to criticising the unfair treatment to which they claim to be subjected within the major international institutions.

Comprising non-Western powers, the BRICS could easily be seen as a pressure group for the major states of the South. Extremely vocal in recent months, have they become the new voice of the "*global South*", the legacy of the [non-aligned movement](#)? In this respect, it is important to avoid any historical shortcuts. While India's presence within the BRICS seems to be part of this lineage, it also reflects its intention to control the ambitions of its powerful neighbour, China, and to implement a diplomacy that can be described as "*pluri-multilateralist*". However, it would be inappropriate to speak of non-alignment with regard to the BRICS as a whole, in a world tending towards a bipolarisation organised around China (a founding member of the BRICS) and the United States (the undisputed embodiment of Western power). On the other hand, it would be insincere not to recognise the BRICS — particularly since their enlargement — as the most visible expression of the "*global South*". Highly focused on their relative or emerging power, the BRICS persist in keeping out — with the exception of [Ethiopia](#) — the world's least developed countries (LDC). But clearly, they have succeeded in swallowing up the old [dialogue India-Brazil-South Africa \(IBAS\)](#) and to sideline the G77, the coalition of developing countries created in 1964 to promote

the economic and political interests of developing countries within the United Nations. More recently, the initiative taken by [South Africa to bring an action against Israel before the International Court of Justice](#) has had a considerable impact in Africa, the Middle East and far beyond.

The strength of the BRICS lies in the fact that they give their members the freedom to take political initiatives, to join in or to keep their distance in order, in the end, to rally new support and, sometimes, to divide Western opinion. This freedom of initiative means that they can embody a form of resistance to the Western world without openly committing the BRICS as a whole and creating potential dissension within them. The most blatant example of this "*method*" is undoubtedly Vladimir Putin's declaration of war on the West and its "*decadent values*". Without attracting the wrath of the BRICS, he has won the support of many countries in the South. But what undoubtedly appeals most to countries hoping to benefit from development support that is less dependent on Western countries is the principle of political non-conditionality that governs the signing of cooperation or development agreements with certain emerging powers. The nature of the regime, its ideological orientation or its respect for fundamental rights is irrelevant, as long as the financial agreement is honoured. This is what makes all the difference with the aid mechanisms proposed by the United States or European countries.

### THE CHINESE ELEPHANT IN THE ROOM

"*If you see everything in grey, move the elephant*" is an old Indian proverb. In fact, it would be a demonstration of blindness not to notice that this principle of political non-conditionality was initially conceived and propagated by the People's Republic of China, in particular at the time of the launch of its famous "*New Silk Roads*". It is the same principle that Russia is currently displaying in Africa when it comes to military and security assistance to military or autocratic regimes. The European Union, whose relations with the United States are sometimes ambivalent, would be wrong not to feel

targeted. The Chinese rhetoric, which highlights the exemplary nature of its economic success in the Third World and likens Europe's demands in terms of human rights and the rule of law to a relic of its colonial culture, is now a classic used by several BRICS countries. The European Union, which bases its power on its trade and its capacity for normative influence, must therefore be more vigilant about the impact of this new narrative.

The BRICS, as an isolated entity, are often perceived as a "*paper tiger*". But in a world of increasing conflict and where political fantasies tend to take precedence over economic realities, we must not overlook the importance of self-fulfilling prophecies in structuring reality. The notions of "*BRIC(S)*" or "*Global South*", invented by Westerners, have been taken up by the countries concerned to give them more than a symbolic incarnation. Since their informal association in 2009, it is China that has been devising, designing and structuring the BRICS. Its ultimate and now avowed objective is not simply to unite the countries of the South, but to build a new global order with China at its epicentre. A discreet member of the BRICS (China is only the fourth letter in the acronym), China is much more than the largest brick in the edifice: it is the cement and the unobtrusive, but determined worker. Over the last ten years, 80% of the increase in trade between the original five BRICS involved China, either as an exporter or importer. To focus on the informal nature of the BRICS is to forget that they are part of a global approach in which Beijing is weaving a wider and denser web across the board through the New Silk Roads, the [Shanghai Cooperation Organisation](#), various regional financing banks and a host of bilateral strategic cooperation and economic development agreements. Moreover, because its international image has deteriorated sharply over the past four years, China is increasingly using the more polite perception of the BRICS to implement its new policy of influence with European elites.

#### MAJOR CHALLENGES FOR EUROPE

Europeans would therefore be wrong not to take a more active interest in the BRICS and the implications

that their enlargement could have. By bringing together four of the biggest oil exporters (Saudi Arabia, United Arab Emirates, Russia and Iran) and two of the three biggest oil importers (China and India), the BRICS could be a precursor to the creation of a new [OPEC](#) which would push up the price of oil and gas imported by Europe and deal a blow to the dollar as an international trading currency in favour of the [petroyuan](#), local currencies, cryptocurrencies, or even the bilateral bartering already practised by China. If this were to happen, the European Union would no doubt see its hopes of making the euro a major trading currency evaporate. At COP 28 in Dubai, we saw the extent to which the European Union and its policy of rapidly phasing out carbon-based energies drew the disapproval of the major oil producers of the South. The risks of divergence between the European Union and the BRICS have also been heightened by the recent increase in armed conflicts. With regard to the BRICS, another little-analysed, but potentially explosive subject is maritime sovereignty. It is striking to note that almost all of the BRICS are states with a fairly extensive coastline, but with a relatively reduced [exclusive economic zone](#) in terms of their land area. The importance of the sea, in terms of commercial and military navigation, ecology and exploitable resources, is one of the major challenges of this century. With [25 million km<sup>2</sup>](#), almost six times its land surface, the European Union has by far the largest maritime area in the world. This is the result of Europe's particular geography, but above all of the legacy of its colonial past. This profound inequality between the European Union and the BRICS could generate embarrassing claims on some European countries in the future.

There is no shortage of risks of conflict between our continent and the BRICS, particularly if we take a realistic view that the BRICS will grow stronger. The current lack of European thinking on this subject is not confined to the European institutions but concerns all the chancelleries of the Member States. This should be seen as an opportunity for the European Union to take up this issue and offer its Member States a framework for reflection

that is both open and forward-looking on this new political issue, which still largely eludes traditional geopolitical analysis, that is more accustomed to a regional rather than a multi-continental approach. As in many other areas, Europe's fundamental vocation is to be much more than the sum of its parts.

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