

The United States and the Global South in a Post-Unipolar World

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Abstract: Unipolarity is declining in the world order. The U.S. grand strategy is also going through a major shift. The “America First” turn will seriously challenge Global South States in the shorter term but provides some longer-term opportunities. Washington’s decentering of allies gives an opening for some middle powers. The Global South is also incentivized to diversify its partnerships, deepen South-South structures, and forge innovative approaches to manage serious challenges such as climate change.

Keywords: United States; Global South; multipolarity; alliances; middle powers.

Os Estados Unidos e o Sul Global em um mundo pós-unipolar

Resumo: A unipolaridade está em declínio na ordem mundial, e a estratégia global dos EUA passa por uma transformação significativa. A guinada da “America primeiro” representa desafios sérios de curto prazo para os Estados do Sul Global, mas também pode abrir oportunidades no longo prazo. O afastamento de Washington em relação aos aliados tradicionais cria espaço para algumas potências médias. O Sul Global, por sua vez, tem incentivos para diversificar parcerias, aprofundar estruturas Sul-Sul e adotar abordagens inovadoras para enfrentar desafios como a mudança climática.

Palavras-chave: Estados Unidos; Sul Global; multipolaridade; alianças; potências médias.

THE RISE AND FALL OF UNIPOLARITY

The end of the Cold War inaugurated the era of unipolarity. The collapse of the Soviet Union was not just a geopolitical defeat but also demonstrated the superiority of the economic system and governing principles of the West over the Soviet bloc. Mikhail Gorbachev's glasnost and perestroika were peaceful attempts at reform, aimed to reconcile the sclerotic Soviet system with the far more agile and attractive offerings of the U.S.-led West. His ultimate rejection by his own citizens, who then went their own ways as multiple sovereign nations, signaled that they were not looking for a middle way but a wholesale adoption of the models that had led to Western successes.

The unipolar decades promised a long peace through global integration with the U.S.-led order and the "end of history" in which democracy and capitalism would triumph (Fukuyama 1992). By and large, the former Eastern bloc and the much larger developing world in Asia, Africa, and Latin America were willing participants in the new rules drafted mostly under U.S. tutelage. These included institutions such as the World Trade Organization, strengthened International Monetary Fund and the World Bank, the indefinite extension of the Nuclear Non-Proliferation Treaty and a reinvigorated United Nations that expanded its role in peacekeeping and humanitarian operations.

The heady optimism of unipolarity, however, began to dissipate rapidly in wake of the criminal terrorist attacks in New York and Washington DC on September 11, 2001. The planes-turned-missiles that brutally smashed the Twin Towers also destroyed the promise of a long peace. The Global War on Terror that followed created much rancor in the Middle East, with its various illegalities such as the 2003 invasion of Iraq. It marked the beginning of the turn away from looking up to the United States in the developing world, now increasingly called the Global South.

But during the first few years of the 21st century, Washington still strode the world like a colossus. However wrong-headed, the project of coercing States to become democracies in the Middle East initially seemed to only reify American power, though now exercised substantially through military means. Three developments indicated more clearly that a decline in unipolarity was truly underway.

First, the financial and economic crisis of 2008 severely damaged the claim of the superiority of the Washington Consensus. No longer was the extreme free

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market model, preached by the titans of U.S. capitalism, seen as the ultimate ideal for every society. Second, the stunning rise of China gave the United States its first peer competitor since the British empire's peak at the end of the 19th century. Initially a manufacturing power, China expanded its military and technological prowess in the first two decades of the century and rapidly closed the gap in output with the United States. That it did so with its own State-led model of capitalism meant that the battle of economic systems was now joined.

Finally, not only did the 21st century mark the rise of China, but also the emergence of a set of middle powers from the Global South. While not global powers in the same sense as the United States and China, nevertheless, States such as Brazil, India, Indonesia, Mexico, Turkey, South Africa, Saudi Arabia and others began to exercise increasing influence in their regions and in some cases even well beyond. They developed considerable State capacities, large middle classes, strong domestic companies with global plays, and increased military capabilities. Most important, these States were led by savvier, more assertive leaders who were intensely focused on national interests and national rise.

PRIMACY'S LONG SHADOW

Although the decline of unipolarity was clear to most international observers by the second decade of the 21st century, Washington continued to act as though the world was still unipolar. This was exemplified by both the first Trump and Biden administrations. Washington's walk-out from the Iran nuclear deal (officially known as the JCPOA) and the Paris Climate Accord; the simplistic framing of a global battle of democracy vs. autocracy; the attempted corralling of U.S. allies from across the world to counter China; and the brave claims to "defeat" Russia militarily and expel it entirely from the international economic order after Moscow's illegal invasion of Ukraine were all indications that Washington was still acting from the well-worn habits of primacy.

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However, the reality that U.S. primacy was on its way out was especially visible during the Ukraine war. Instead of working with the Global South and China to forge a common response to contain the conflict and bring about a settlement,

Washington forged an essentially unilateralist path with just its core allies involved. The result was that sanctions against Russia were ultimately ineffective, Moscow drew even closer to Beijing, and key Global South States such as India, Turkey and others prioritized their own interests on relations with Moscow rather than bend to American demands.

THE “AMERICA FIRST” BACKLASH

Even as U.S. habits of primacy were in growing tension with the gradual but definitive shifts of power in the global order, the average American voter was becoming increasingly disenchanted with elite politics at home. Seeing Washington as compromised and disconnected from their daily challenges, voters elected an insurgent candidate Donald Trump to presidency in 2016, and again with a bigger margin in 2024. Trump campaigned as an unabashed American nationalist with his “America First” slogan. He railed against immigration and crime, promised to “put an end to endless wars” and “prevent World War III,” shrink the liberal State, and impose tariffs against foreign countries to reindustrialize America (Aljazeera 2024).

During his first term, Trump was able to put in place a framework for ending the U.S. war in Afghanistan during extensive negotiations with the Taliban mediated by Qatar. However, in China and Iran he took a hawkish approach reminiscent of previous presidents. Trump’s first term was essentially a coalition between his America First instincts and the mainstream Republican party, which often led to policy dissonance and rapid turnover of key cabinet personnel.

But four months into his second term, Donald Trump has come into his own like never before. His immediate engagement with Russia to achieve peace in Ukraine, re-entering negotiations with Iran, radical turn toward economic protectionism, and a new focus on territorial acquisition (Greenland and the Panama Canal) mark a break with decades of U.S. grand strategy in multiple ways.

The America First movement rejects globalism and global elites (which is also mirrored in insurgent politics in countries such as France and Germany). The rejection of globalism also translates into a critique of “endless wars”—interventions by previous U.S. administrations in the Middle East and elsewhere fought for ostensibly nation-building purposes or to spread democracy. The failures of the interventions in Afghanistan and Iraq were a factor in the birth of the America First movement. Trump criticized these wars right from his first presidential campaign onward, and his criticisms resonated with many working-class voters across the country.

But America First is also a major shift away from the traditional bipartisan centering of major U.S. allies in the Washington discourse. These include North Atlantic Treaty Organization (NATO) member States in Europe, Japan, South Korea, and Australia. But among these, Europe and NATO have been at the very core of the U.S. alliance system. Biden, for example, termed NATO's security guarantee as "sacred."

The new American worldview rejects the special place Europe has traditionally occupied in U.S. grand strategy. In the Trump era, Europe, like other parts of the world, is a target of harsh tariffs. Washington also demands it pay more for its own defense. More fundamentally, Trump is not a votary of NATO's security guarantee and the idea of a common defense (Keating 2025). For the new Washington, sovereignty and national greatness (as Washington now defines it) are paramount. Partnerships, commitments, and cooperation with foreign States and international organizations are essentially transactional and dispensable.

However, even as the Trump administration initiates radical departures from prior U.S. policies, there seems to be continuity on at least one front—China. With several China hawks in his team, countering Beijing is perhaps Trump's greatest priority, second only to his domestic goals. He has greatly stepped up the trade war with China, with tariffs now at an astounding 145%—with exemptions given for smartphones and other electronic items (Lawder & Mason 2025). Though there are recent hints of a trade thaw, a tough, protectionist economic policy towards China is expected to remain a core feature of the President's second term (Bloomberg News 2025). In the security plane too, Washington continues to ramp up its cooperation with its Asian allies—especially Japan and the Philippines—to create a front against China.

A NEW GLOBAL SOUTH

Where does the major shift underway in U.S. grand strategy leave the Global South? Before we answer the question, it is helpful to review what the Global South is in our times. Historically, the Global South, once called the "Third World," was born in the wake of decolonization of Asia and Africa (Shidore 2023a). Beginning with the independence of Asian powers such as India and Indonesia, the freedom movement in the former European colonies snowballed by the 1960s, when a slew of African countries became independent. By 1990, the number of independent States in the United Nations had reached 159, a tripling since it was founded in 1945 with 51 members. A vast majority of these new States were from the Global South.

In the 1960s and 1970s, the newly-freed Global South was almost entirely made up of low- or lower-middle income countries. Latin America and the Caribbean,

though they became free of colonial rule much earlier (in the early 19th century), had a shared sense of economic solidarity with developing States in Asia and Africa. Most of the Global South subscribed to economic theories of autarky developed by economists such as Argentina's Raul Prebisch. Import-substitution and State control over the commanding heights of the national economy were adopted as paths to development, as was forming a common front of Global South States. The peak in the idea of Southern solidarity was seen with the New International Economic Order debates at the United Nations, and the high point of the Non-Aligned Movement (NAM), both in the 1970s.

By the first decade of the 21st century, however, the picture had become much more complex. A set of developing States, predominantly in Asia, had broken out of the low-income category and achieved rapid industrialization. Southeast Asia took a sharp turn toward integration with the global economy, stressing exports over import-substitution. After having the same per capita gross domestic product (GDP) as Ghana in 1965, Singapore vaulted to become among the world's richest States. Malaysia and Thailand reached the threshold of upper-income status, with Vietnam and Indonesia showing every promise of doing the same. In Latin America, Mexico emerged as an industrial powerhouse after the signing of the North American Free Trade Agreement (NAFTA), becoming deeply enmeshed in North American automotive and other supply chains; and Brazil grew strongly on the back of its commodity exports and leadership in areas such as energy, aircraft, and automobiles. Meanwhile, a set of Gulf States leveraged their major oil & gas endowments to achieve high living standards and later began diversifying to embrace industrialization. In Africa, South Africa and Kenya emerged as growth poles. However, 40-odd "least developed countries," mainly in Africa and the Pacific, remain extremely deprived, with many of them also in a debt crisis.

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The upshot of all this is that the Global South has become economically much more diverse. A significant gap has opened between most of Asia and Latin America and much of Africa. There has also been a sea-change in the approach of these countries toward international trade and investment. Most Global South States have abandoned centering autarky and have moved toward welcoming

foreign trade and investment on their terms. The new approach is pro-globalization, but in qualified ways with a guiding role for the State. Essentially, the Global South wishes to integrate with the advanced world in ways that favor its own economic and geopolitical rise (Shidore 2024a).

The Global South also no longer pursues projects of forming a common front or a bloc like it did during the height of the days of NAM and the New International Economic Order (NIEO). Its States have become much savvier in practicing the art of hedging between the three great powers. They now focus even more on their own individual rise. While some of them such as Brazil, Indonesia, India, South Africa, and the United Arab Emirates have co-founded or joined BRICS with Russia and China, they are equally committed to integration with wealthier Western economies. For example, Brazil, Indonesia, Peru and Thailand have become official candidates to join the Organisation for Economic Co-operation and Development (OECD), while Mexico, Chile and Colombia are already its members.

To summarize, the Global South is not a united bloc, but a “geopolitical fact” (Shidore 2023a). Its States add up to more than the sum of their parts simply by relentlessly pursuing their own interests.

RESPONDING TO THE NEW ORDER

There is no doubt that the Global South is greatly disadvantaged by many of the shifts in Washington worldview. The tariffs, which punished the relatively industrialized countries in Asia the most, will likely result in slower growth, and any fragmentation of the global economy can reduce interdependence and worsen conflicts. In the poorest, debt-ridden countries, the withdrawal of foreign aid could amplify existing conflict and lead to more failed States. These are serious challenges in the short-to-medium term.

In the longer term, however, there could also be some opportunities. First, the whittling down of Europe’s centrality—and of other core allies such as Japan—in Washington’s worldview means that there is more of a level playing field between the United States and the Global South, at least its middle powers. If core allies are not at the core anymore, then those outside the inner circle benefit in relative terms. This means that, theoretically at least, deals can be struck with the Trump administration.

In general, almost all Global South States have taken the approach of dialogue rather than retaliation. For example, Mexico, which is among the most affected by shifts in U.S. economic and security policy, has taken a measured approach, resulting

in its President Claudia Sheinbaum even being praised by Trump. India and the United States are making progress in achieving a bilateral trade agreement. Vietnam has offered zero tariffs for U.S. imports.

At the same time, Global South States have also realized that the United States is no longer a reliable partner when it comes to economic and (in many cases) security ties. This has triggered a search for alternatives. Chile and Brazil have announced their intention to deepen regional integration. Southeast Asia is also looking to diversify its portfolio of partners. The Philippines, which has deepened its security cooperation with the United States recently due to ongoing Chinese intrusions in the South China Sea, is simultaneously building closer security ties to Asian middle powers as an insurance policy against any U.S. abandonment.

However, Latin America faces significant pressure in the coming years due to its proximity to the United States. The U.S. push for territorial acquisition and deeper security interventions—a return of the Monroe Doctrine of sorts—are in major tension with the strong sense of sovereignty deeply embedded among even the smallest States in the region. But beyond Mexico, Central America, and Colombia, Latin America has already built close ties with extra-regional partners—chiefly China and Europe. Mercosur and the European Union signed a landmark free trade agreement in 2024. Brazil's agricultural exports to China are increasing substantially as U.S.-China decoupling takes hold (McCoy 2025). Even Argentina, led by a president close to Donald Trump, has drawn the line on sacrificing its economic ties to China. Washington will find it challenging to force most Global South States to reduce their ties with Beijing.

Even as Global South States resist choosing sides between the United States and China, prospects for greater South-South ties have brightened. This is not just because of the apparent U.S. exit from international cooperation, but also from the host of common challenges that know no borders. (...) This is where new and expanding organizations such as BRICS can play a role. (...) BRICS is now a major inter-regional organization in which the wealthy West is conspicuous by its absence.

Even as Global South States resist choosing sides between the United States and China, prospects for greater South-South ties have brightened. This is not just because of the apparent U.S. exit from international cooperation, but also from the host of common challenges that know no borders. Climate change, pandemics, and global financial stability are three such phenomena. Solving them—or at least managing their ill effects—cannot be done without global cooperation.

This is where new and expanding organizations such as BRICS can play a role. Beginning as a modest gathering of the four BRIC foreign ministers in 2006, the organization upgraded to leader-level summits starting in 2009 in Russia. Soon thereafter, South Africa was admitted, making it BRICS. In 2023, BRICS got a second wind with a major expansion to nine States. Indonesia joined in early 2025, making it ten.

BRICS is now a major inter-regional organization in which the wealthy West is conspicuous by its absence. It is essentially a working coalition of Russia and China and eight Global South States. The coalition is not a security alliance—indeed BRICS is not and will never be a security club. But there are two key drivers for the grouping’s new-found popularity. First, as gaps in problem-solving in the U.S.-led global order have become more acute, there is a strong demand signal from the Global South for deeper coordination (Shidore 2023b). By joining BRICS, these States are also practicing hedging against the uncertainty of a world in which the United States is no longer dominant (Shidore 2024b). Both these drivers are likely to persist. Therefore, despite its still-modest imprint on the ground, and the undeniable challenges of a world enmeshed in conflict, BRICS has major significance for the future of the global order, and ought to be taken seriously (Shidore 2024c).

Climate change is perhaps the most dangerous challenge that bedevils the global order. (...) With its second exit from the Paris Agreement and sharp turn away from supporting the energy transition, the United States has, for all intents and purposes, abandoned the global climate conversation.

Brazil and India stand out within BRICS as two outsized Global South States with influence beyond their regions. They are also among the original founders of the organization. Both are committed to multilateralism and aspire to permanent membership in the UN Security Council, but both also have long sought to mend

inequities in the global order and act as bridges between the North and the South (Albuquerque et al. 2022). Thus, cooperation between Brazil and India is fundamental to the success of BRICS.

Climate change is perhaps the most dangerous challenge that bedevils the global order. Massive heatwaves, droughts, floods, and hurricanes will increasingly affect almost all nations. With its second exit from the Paris Agreement and sharp turn away from supporting the energy transition, the United States has, for all intents and purposes, abandoned the global climate conversation. As the global temperature rise appears to be on track to exceed 1.5 °C, the importance of climate adaptation is only increasing.

This is an arena of the utmost urgency, but, for the foreseeable future at least, the Global South will need to forge deeper understandings with major players other than the United States—especially China, the EU, Japan, and Russia—to continue to make progress in limiting the worst effects of climate change, and also including its adaptation and security dimensions (Better Order Project 2025). Such cooperation ought to be pursued in the United Nations Framework Convention on Climate Change (UNFCCC) Conference of the Parties (COP) framework, but issue-based coalitions will also be needed as a complement to the UNFCCC to make faster progress. ▬

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