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## **Constructing a virtual region: The role of identity in shaping BRICS**

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# Constructing a virtual region

## The role of identity in shaping BRICS

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# ABSTRACT

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This thesis examines why BRICS emerged among Brazil, Russia, India, China and South Africa, despite the dissimilarities between these countries. Following a constructivist approach, this thesis assumes that regions are not fixed but rather constituted and constructed through ideational factors. As such, BRICS is considered a ‘virtual region’. The aim of this thesis is to explain the process through which a collective identity paved the way for cooperation among the countries. The analysis shows that the BRICS identity is rooted in the longer-standing narrative about the Global South. The shared identity facilitated the alignment of their interests. Despite some variation, a development-multipolarity discourse is identified. The countries not only seek economic development within BRICS and the Global South, but also a greater voice in global governance. The creation of a collective identity and the alignment of interests paved the way for BRICS to emerge as virtual region, embedded in the Global South narrative.

Keywords: *BRICS, regionalism, virtual regionalism, identity, constructivism*

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# 1. INTRODUCTION

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Over the past decades, Brazil, Russia, India, China and South Africa have gained great influence in global politics and economics, either as emerging or re-emerging powers (Konyshev & Sergunin, 2022). This thesis questions what factors enabled these countries to establish BRICS, despite apparent economic, political and cultural dissimilarities. The acronym BRIC was coined in 2001 by Jim O’Neill, then economist at Goldman Sachs, to underline the economic potential of Brazil, Russia, India and China (O’Neill, 2001). Since 2006, these countries have gradually developed a platform of cooperation. Using the name ‘BRIC’, it became an intergovernmental grouping in 2009, when the first summit took place (Acharya, 2023). In 2010, South Africa was also included, marking the transformation from BRIC to BRICS. Since then, the countries have expanded cooperation, both economically and politically (Roberts et al., 2017).

The BRICS countries combined account for over 40 percent of the world population and a quarter of the global economy (Acharya, 2023). However, there is no consensus on why these countries choose to collaborate within BRICS in light of the considerable differences between the five countries (Pant & Scholz, 2022; Konyshev & Sergunin, 2022).

Even though all members are classified as emerging economies (International Monetary Fund, 2021), the level of economic development varies. China is BRICS’ biggest economy, estimated to have a nominal GDP of 19.373 billion (USD) in 2023. Its smallest member, South Africa, has a GDP of 399 billion (International Monetary Fund, 2023). Despite this difference, all five have witnessed economic growth in the last decade. Moreover, India has an estimated population of 1.4 billion, making it the most populous BRICS country. South Africa has an estimated population of 58 million (United Nations Population Division, 2022). The predominant religion in Brazil, Russia and South Africa is Christianity. The majority of Indian people is Hindu, and most Chinese people are unaffiliated (Pew Research Center, 2012). The countries’ political systems range from democratic forms of government in Brazil, India and South Africa to authoritarian regime types in Russia and China (Freedom House, 2023).

The formation of BRICS is puzzling due to the stark contrasts between its member states in terms of economic development, political systems, and cultural background. It raises the question what factors have allowed these countries to form the BRICS grouping. The research question is: *Why did BRICS emerge among Brazil, Russia, China, India and South Africa, despite the dissimilarities between these countries?*

This study's goal is to understand the process that gave rise to cooperation between Brazil, Russia, India, China and South Africa within the BRICS framework. In doing so, I follow a constructivist approach. This study draws from scholars who argue that there are no 'fixed' or 'given' regions. Instead, regions are constituted and constructed by political forces (Hemmer & Katzenstein, 2002; Hettne & Söderbaum, 2000; Murphy, 1991; Neumann, 1994; Söderbaum, 2004, 2016). Regions are created, recreated and undone based on collective human activity, shared beliefs and identity-building (Söderbaum, 2004, 2016). This process can be either intentional or unintentional, and endogenous or exogenous (Söderbaum, 2016).

Following this logic, I focus on regionalism. Regionalism represents '*the body of ideas, values and policies that are aimed at creating a region, or it can mean a type of world order*' (Söderbaum, 2016, p. 3). Regionalism is described as a state-led process of establishing regional arrangements (Börzel & Risse, 2016, p. 7). As such, regional cooperation is often enshrined in formal or informal agreements (Ferry, 2021, p. 39). Regionalism is traditionally studied from rationalist and materialist perspectives, emphasizing countries' strategic interests in forming regional alliances for security, economic or political benefits. This approach views countries as rational actors in an anarchic system, where power dynamics and institutional frameworks play important roles in shaping regional cooperation (Söderbaum, 2016, pp. 37-42).

The emergence of constructivist approaches to regionalism introduced ideational factors as important determinants of regional cooperation (Adler & Barnett, 2009; Barbieri, 2019). Constructivism challenged rationalist and materialist assumptions, particularly those of neo-functionalism and neo-liberal institutionalism (Börzel & Risse, 2016, p. 120). This approach questions traditional ideas about region-building (Adler, 2013). It found a large field of application beyond Western regionalism, as conventional views fell short in effectively assessing non-Western regionalism (Acharya, 2005, 2009, 2012; Barbieri, 2019; Hemmer & Katzenstein, 2002). Regional blocks like the Association of Southeast Asian Nations (ASEAN), the Southern African Development Community (SADC) and the Arab League show a picture that is partly contrary to rationalist and materialist frameworks, as their regional cooperation seems to be driven by identity and is generally less institutionalised (Barbieri, 2019, p. 434).

Ideational factors have been identified as important determinants of regionalism in Southeast Asia. While ideational factors are not the only determinants – Emmerson (1984) argues that historical, cultural and political similarities that exist between at least overlapping parts of ASEAN also influence its regionalism – these factors seem to be among the driving forces (Acharya, 2012). Weatherbee (2014) argues that Southeast Asia is a 'virtual' or

'imagined' region. The scholar states that cooperation between the countries stems not purely from natural conditions, like geographical proximity, but from the political will of Southeast Asian leaders. Ideational factors are crucial in the process of region-building. This line of thought resembles to this study's core assumption. Neither geographical proximity nor apparent similarities in economic development, political systems or cultural background characterise cooperation between Brazil, Russia, India, China and South Africa. Instead, I argue that the five countries imagine themselves to be part of a virtual BRICS region.

In this study, I focus on the role of identity in shaping cooperation between the BRICS countries. Through process tracing, I aim to explain the process through which a collective identity paved the way for (virtual) regional cooperation among the BRICS countries. The role of identity is understudied as well as contested in the scholarly debate on regionalism (Börzel & Risse, 2016, pp. 562-563). By examining the role of collective identity in the emergence of BRICS, this study contributes to the scholarly debate on regionalism in two ways.

First, this study contributes to the width of the debate by applying the theory of (virtual) regionalism to BRICS. Much of the debate revolves around the European Union and East Asia, focusing on regional organisations like ASEAN (Acharya, 1997, 2005, 2009, 2012). However, BRICS remains severely understudied (Konyshev & Sergunin, 2022). BRICS provides a unique case study that challenges traditional views on regional cooperation. Unlike regional groupings characterised by geographical proximity, BRICS can be considered a 'virtual region'. In recent years, scholars have argued that academic work should move beyond traditional understandings of regionalism to match the contemporary nature of global governance (Acharya, 2014; Börzel & Risse, 2016; Shaw et al., 2011; Söderbaum, 2016). Scholars consider BRICS a key example of contemporary regionalism (e.g. Lagutina, 2019; Naik, 2018) but do not sufficiently explain how BRICS constitutes a region. By applying the theory of regionalism to BRICS, this study aims to fill this literature gap and offer a perspective on what constitutes a virtual region.

Second, this study addresses a gap in the literature by focusing on the relationship between collective identity and regionalism. While some constructivists have explored identity in relation to regionalism, most scholars rely on rationalist and materialist assumptions (Acharya & Johnston, 2008; Börzel & Risse, 2016). Ignoring identity in the debate on regionalism is unjustified, as scholarly work, primarily focused on regionalism in Southeast Asia, shows that identity plays a key role in shaping regional cooperation (Acharya, 1997, 2005, 2009, 2012; Acharya & Stubbs, 2006). This study expands the scholarly debate on regionalism by seeking to explain the role of collective identity in the emergence of BRICS.

From a societal perspective, this study offers important insights for policymakers and diplomats. Understanding the ideational factors driving BRICS can guide foreign policy and diplomatic strategies for actors seeking to engage with or respond to BRICS. Understanding that BRICS is not just about economic or political benefits but also about identity can lead to more effective decisions and strategies. For instance, an NGO focused on sustainable growth could develop partnerships in BRICS countries, emphasizing shared ideas and beliefs about the challenges and solutions to engage effectively with governmental and local actors. This study equips policymakers and diplomats with a deeper understanding of the ‘why’ behind BRICS cooperation, providing them with a lens through which they can interact with BRICS.

This thesis proceeds in five stages. Following the introduction, the second chapter provides a review of the existing literature. The chapter outlines several theoretical approaches to regional cooperation, and evaluates them in light of the BRICS cooperation. The third chapter sets forth the theoretical framework of virtual regionalism and conceptualises the role of collective identity in shaping regional cooperation. The fourth chapter presents the study’s methodology. The fifth chapter seeks to answer the research question why BRICS emerged among Brazil, Russia, India, China and South Africa. The last chapter presents the main results of the analysis as well as a discussion of these results.



## 2. LITERATURE REVIEW

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This chapter reviews some of the most influential approaches to regional cooperation in light of the BRICS cooperation: 1) neorealist and intergovernmentalist approaches; 2) functionalist, liberal and institutionalist approaches; and 3) constructivist approaches. In this literature review, I do not seek to provide an all-encompassing overview – there are more approaches that may explain regional cooperation – but rather critically assess the most relevant approaches.

### 2.1. Neorealism and intergovernmentalism

From a neorealist and intergovernmentalist perspective, states are unitary and rational actors in an anarchical global system (Söderbaum, 2016). Regions may develop to ensure survival or increase power. Regional cooperation may be a rational choice to counter the power of another state or group (Gilpin, 1987). At the core is intergovernmental bargaining (Cini, 2022).

The power transition theory (PTT) assumes that as emerging powers gain economic, military and political power, they become more likely to challenge status quo powers (Konyshev & Sergunin, 2022, p. 103). The emergence of BRICS can be interpreted as a strategic move to challenge the global order, which is perceived by the BRICS countries as dominated by the West (Duggan et al., 2022; Konyshev & Sergunin, 2022). Stuenkel (2014) argues that their cooperation stemmed from a desire to increase their status. The scholar argues that they may have seen the 2007-2008 financial crisis as an opportunity to increase their voice in global governance (Stuenkel, 2013). However, scholars do not perceive BRICS as a platform that wants to radically change the global system, but rather make it fairer and more efficient (Hansen & Sergunin, 2015). PTT does not sufficiently take this view into account.

Some suggest that BRICS primarily benefits China's global aspirations, considering the asymmetric development of its members (e.g. Pant, 2013). China may use BRICS to position itself as a leader in the region and developing world (Duggan et al., 2022). While China is a key player within BRICS, viewing the grouping as primarily advantageous for China overlooks some aspects. All members gain from BRICS cooperation. For instance, India seeks to amplify its voice in global governance, while South Africa aims for economic growth (Roberts et al., 2017). Cooperation contributed to economic growth of all members (Saji, 2019). Additionally, BRICS encourages mutual benefits by advocating for a more equitable global governance.

There is also rivalry in the relationship between China and India. Their shared history is marked by several border disputes, such as the Sino-Indian War in 1962 and the ongoing hostilities over the disputed Kashmir region (Ethirajan & Pandey, 2020). Markey and Scobell (2023) argue that, as a result of these clashes, the United States have sought to deepen US-India ties, but they expect India to maintain its policy of non-alignment.

## **2.2. Functionalism, liberalism and institutionalism**

Functionalist, liberal and institutionalist approaches generally assume that regional cooperation is derived from rational and pluralist assumptions. This cluster of approaches assumes that mutual benefits can be gained from regional cooperation and emphasizes regulation within an institutional framework (Söderbaum, 2016, p. 40).

International regime theory is an approach that seeks to explain cooperation between countries by focusing on the role of institutions in overcoming problems of collective action, like economic underdevelopment (Haggard & Simmons, 1987). BRICS cooperation may serve strategic interests, whether it is economic growth or increasing power, which aligns with rationalist institutionalist views (Chaulia, 2021). Yet, BRICS is a loose type of collaboration, which defies institutionalist notions. BRICS cooperation is primarily based on bilateral rather than multilateral agreements and is generally not institutionalised (Pant & Scholz, 2022).

From an economic view, BRICS cooperation may be explained by regional economic integration (Venables, 2001). Stuenkel (2013) assumes economic growth to be one of the main drivers of BRICS cooperation. Sperlich (2015) observes an increase in intra-BRICS trade in the period 2001-2013. Multilateral initiatives, like the New Development Bank and the foreign-exchange reserves pool, have strengthened intra-BRICS financial cooperation (Duggan et al., 2022, p. 471). However, it is unclear whether this is the result of increased cooperation or decreasing transportation costs due to globalisation (Sperlich, 2015, p. 24).

## **2.3. Constructivism**

The constructivist approach provides another view on the emergence of BRICS. This approach is often referred to as the ‘middle ground’ in between rationalist and reflectionist theories (Adler, 2013). Previously mentioned approaches (partly) explain regional cooperation, but do not sufficiently consider the effect of non-material factors. Constructivism opposes the notion that countries’ behaviour and practices are solely determined by rationalist and materialist factors, and instead emphasize the role of ideational factors (Söderbaum, 2016; Adler, 2013).

Among the most important ideational factors are identities that are collectively held (Finnemore & Sikkink, 2001). Identities are historically and socially constructed through interactions and the exchange of ideas (Wendt, 1992). Continuing interactions between countries may lead to changes, and divergent narratives may exist within a country (Finnemore & Sikkink, 2001). Research shows that ideational factors, like identity, are important drivers of cooperation among countries in Southeast Asia (Acharya, 1997, 2005, 2009, 2012; Acharya & Stubbs, 2006).

Weatherbee (2014, pp. 16-17) considers Southeast Asia to be a 'virtual region'. The scholar argues that a Southeast Asian region exists because political actors agree to a certain extent on what their 'regional' interests are and how they should act to achieve those interests. While there are historical, cultural and political similarities between (some) countries in Southeast Asia, Weatherbee (2014) argues that a collective identity was among the main drivers of cooperation. As such, an ideational process is at the core of Southeast Asian regionalism.

BRICS resembles Southeast Asian regionalism in many ways. BRICS cooperation is characterised by a top-down and state-led approach, increased economic interactions between countries and bilateral rather than multilateral agreements (Roberts et al., 2017). BRICS and ASEAN differ regarding the level of institutionalisation; ASEAN has a permanent secretariat, formal charter and institutionalised meetings, while BRICS does not (Acharya, 2012).

BRICS challenges conventional notions of regionalism. The BRICS countries are spread across different continents and do not seem to have much in common, besides their label of 'emerging economies'. Against this backdrop, virtual regionalism, or the idea of a virtual region, emerges as potential explanatory framework for understanding BRICS.

Some scholars consider BRICS to be a new type of regional project. Naik (2018) and Lagutina (2019) contribute to the debate on BRICS and regionalism. However, both scholars do not consider ideational processes that may underlie BRICS cooperation. Naik (2018) regards BRICS as 'hybrid form of interregional interactions' but fails to explain what binds these countries, apart from their desire to increase power. Lagutina (2019) considers BRICS a 'global region' in a regio-polar world order, in which not states but regions are dominant. The scholar fails to explain how BRICS might constitute such a 'global region'.

Following the constructivist notion that regions are constituted and constructed through ideational factors, I argue that BRICS constitutes a 'virtual region'. Central to this is the idea that a collective identity among the BRICS countries shaped their cooperation. This study aims to expand the existing literature by applying virtual regionalism to BRICS, and contribute to the debate on regionalism by focusing on the role of identity in shaping cooperation.

## 3. THEORETICAL FRAMEWORK

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Scholarly work has provided various conceptualisations of regionalism (e.g. Börzel & Risse, 2016; Farrell et al., 2005; Hettne & Söderbaum, 1998; Hettne et al., 1999; Söderbaum, 2016). This chapter provides this study's theoretical framework. It conceptualises the theory of (virtual) regionalism in relation to BRICS. Furthermore, it elaborates on the relationship between collective identity and the emergence of a virtual region.

### 3.1. Regionalism

Regionalism is defined as a process of forming and maintaining regional institutions among at least three countries (Börzel & Risse, 2016, p. 7). It refers to a framework of ideas, values and policies that are aimed at creating a region (Söderbaum, 2016, p. 3). Regionalism is a top-down process, which means that it is primarily state-led (Börzel & Risse, 2016; Hettne et al., 1999). Regional cooperation is often enshrined in formal or informal agreements (Börzel & Risse, 2016; Ferry, 2021; Söderbaum, 2016). While formal cooperation refers to a rules-based collaboration, informal cooperation refers to a loose type of collaboration (Söderbaum, 2016, p. 82). Regionalism typically stems from a political intention to create a formalised and institutionalised arrangement among countries, especially in Western regionalism.<sup>1</sup> Moreover, the study of regionalism mostly follows rationalist and materialist views and emphasizes geographical proximity (Hettne & Söderbaum, 1998; Hettne et al., 1999).

Scholars often distinguish between 'old' and 'new' regionalism (Söderbaum, 2016, p. 16). Both concepts are heavily intertwined, but differ in the importance they attach to certain aspects. Old regionalism emerged in Western Europe following the end of the Second World War. It places states at the centre and focuses on formalised inter-state (economic) cooperation. In contrast, new regionalism assumes that states are the drivers behind regional cooperation, but also assumes that businesses and civil society play an active role (Söderbaum, 2016).

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<sup>1</sup> This study's focus is on regionalism rather than regionalisation, but it is important to make a conceptual distinction between the two. Regionalisation refers to the '*processes of increasing economic, political, social or cultural interactions among geographically or culturally contiguous states and societies*' (Börzel & Risse, 2016, p. 9). Regionalisation is typically driven by business and civil society actors; regionalism is driven by governmental actors (Farrell et al., 2005; Hettne & Söderbaum, 2000). Regionalisation is often 'spontaneous' and cannot be considered an 'instrument' that is intentionally used by actors (Hurrell, 1995, p. 334).

Several scholars argued that scholarly work should move beyond new regionalism (e.g. Acharya, 2014; Börzel & Risse, 2016; Shaw et al., 2011; Söderbaum, 2016). Contemporary regionalism is shaped by diverse and contrasting processes, and entails multiple actors and sectors (Börzel & Risse, 2016, p. 32). Scholars illustrate the shift to contemporary regionalism by emphasizing present-day trends, like different thoughts on government and governance, multipolarity and the prevalence of regional cooperation (Acharya, 2014). BRICS is often considered a key example of contemporary regionalism (Börzel & Risse, 2016, p. 32).

BRICS is an atypical case regarding regionalism. It does not represent a geographical region nor a clear-cut community (Konyshev & Sergunin, 2022, pp. 110-111). In this context, virtual regionalism emerges as a potential explanatory framework. The starting point of virtual regionalism is that regions are constituted and constructed (Hemmer & Katzenstein, 2002; Hettne & Söderbaum, 2000; Murphy, 1991; Neumann, 1994; Söderbaum, 2004, 2016). Following the constructivist notion, a region is not necessarily based on geography but rather constituted through shared identities, values and interests (Hettne & Söderbaum, 2000; Hurrell, 1995; Weatherbee, 2014). As such, virtual regionalism is a result of an ideational process. The idea of a 'region', especially one that is not defined by geography, stems considerably from the will of political actors (Weatherbee, 2014, pp. 16-17). Virtual regionalism is centred around informal networks and issue-based cooperation. The focus is on functional, network-type, multi-actor and multi-factor principles (Konyshev & Sergunin, 2022, p. 110).

BRICS might have emerged as virtual region. BRICS cooperation is not defined by geographical proximity, but rather by their shared experiences as (re-)emerging economies and aspirations in global governance. Scholars emphasize the effect of ideational factors in shaping BRICS cooperation (e.g. Konyshev & Sergunin, 2022; Pant & Scholz, 2022).

### **3.2. Identity and virtual regionalism**

Collective identity plays a constitutive role in the willingness of countries to cooperate with other countries in regional institutions (Prieto, 2012; Söderbaum, 2016). Region-building is typically initiated by region-builders, often political actors, who imagine a certain collective identity and diffuse that identity to others. Accordingly, identities are not necessarily given, but imagined (Neumann, 1994, p. 58). Collective identity influences not only the willingness to cooperate, but also the manner in which they do so. In essence, what actors do, depends on their perceptions and how the actors engage with one another (Söderbaum, 2004, p. 4).

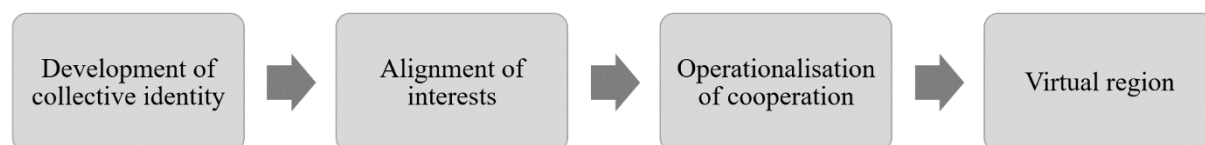
This study defines collective identity as ‘*mutually constructed and evolving images of self and other*’ (Jepperson et al., 1997, p. 21). It is reflected in public discourse, political symbols and collective memories. Moreover, it entails shared beliefs about how the group is defined and who belongs to it (Börzel & Risse, 2016, p. 560). In this view, identity becomes apparent through social practices and political attitudes, which are influenced by social structures and domestic contexts (Börzel & Risse, 2016; Checkel & Katzenstein, 2012).

Collective identity is an important driver for the development of regional cooperation. Yet collective identity is not the sole factor. Collective identity shapes action rather than explains regional cooperation directly (Söderbaum, 2004, pp. 44-45). Identity does not provide a direct, stand-alone explanation for countries’ behaviour and practices. Instead, identity, as a constitutive factor, informs and transforms interests that may motivate regional cooperation. In other words, identity influences the interests of the countries, which, in turn, may lead to cooperation among them (Söderbaum, 2004; Prieto, 2012).

Cooperation between countries manifests in collaborative actions. Operationalisation of cooperation often includes the establishment of institutional frameworks, but it might also entail a loose type of cooperation, based on informality (Söderbaum, 2016, p. 82). BRICS cooperation is characterised by a low level of formalisation and institutionalisation (see chapter 2.3).

Shared identity and interests paved the way for the emergence of BRICS as virtual region. The starting point, following the conceptualisation of virtual regionalism, is that regions are constituted and constructed through ideational processes (see chapter 3.1). BRICS, through an ideational process of identity-building, constitutes a virtual region.

This study hypothesizes that the emergence of a collective identity among Brazil, Russia, India, China and South Africa facilitated the alignment of their interests, which motivated these countries to cooperate within BRICS.<sup>2</sup> The BRICS countries imagine themselves to be part of a virtual BRICS region. Figure 1 shows the causal mechanism.



*Figure 1. Causal mechanism*

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<sup>2</sup> Börzel and Risse (2016, p. 573) argue that regional cooperation may also precede identity formation. This study does not seek to explore nor refute the idea behind this causality. Research shows that the reverse (i.e. collective identity preceding regional cooperation) is typically the exception in non-Western regionalism.

## 4. METHODOLOGY

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### 4.1. Case selection

This study will explore why BRICS emerged among Brazil, Russia, India, China and South Africa, despite their dissimilarities. The argumentation for choosing BRICS as a case study is threefold. First, BRICS is a unique case because of the absence of geographical proximity between the countries. BRICS cooperation challenges conventional approaches to regionalism, which often assume geographical proximity to be one of the main factors. BRICS allows for an exploration of virtual regionalism (and BRICS as virtual region as such).

Second, cooperation between the BRICS countries is not characterised by apparent similarities in economic development, political systems or cultural aspects. The absence of such similarities underscores the significance of examining alternative factors, like ideational factors (i.e. collective identity), in the emergence of BRICS. Moreover, it provides an opportunity to explore how such disparities impact (regional) cooperation. The diversity within BRICS offers a rich context for a constructivist analysis and the examination of ideational factors.

Third, BRICS consists of (re-)emerging countries that have the potential to become increasingly influential on the global stage, both economically and politically. The recent expansion of BRICS – five countries officially joined on 1 January 2024 (Du Plessis et al., 2023) – not only hints at its growing influence but also at the potential for this group to evolve into an even larger virtual region. An expanded BRICS is likely to be (even more) influential in international forums like the United Nations. Additionally, membership expansion demonstrates the relevance of virtual regionalism, where geographical proximity is not the main driver of cooperation among countries, but rather ideational factors. The success of the initial BRICS grouping, consisting of the five countries, might set a precedent, as other (developing) countries wish to join the grouping, for example in their desire for economic growth.

BRICS is a stand-alone case in the study of regionalism, primarily because it challenges conventional characteristics that define regional cooperation. This builds upon the previously mentioned arguments. Unlike traditional regional groupings, BRICS is not bound by geographical proximity; its members are spread across continents. Additionally, the BRICS countries significantly differ in many aspects. By examining BRICS, I do not aim for external validity, but seek to explain the role of identity in a stand-alone case, namely BRICS.

## **4.2. Research method**

By conducting process tracing, I aim to explain the formation of BRICS. Process tracing is a qualitative research method that seeks to identify the causal process between the potential cause and outcome (Beach & Pedersen, 2019; Bennett & Checkel, 2014). Process tracing aims to determine whether the theorised causal process can be observed in a specific case (Bennett & Checkel, 2014). This method enhances theoretical understanding by studying within-case mechanisms, provides insights into how causal processes function in real-world situations and strengthens causal inferences in individual cases. This method adds inferential leverage that quantitative analyses generally lack (Beach & Pedersen, 2019).

Process tracing aligns well with the constructivist approach of this study. By using this method, I can trace the development of a collective identity among the BRICS countries and how this identity shaped the countries' (shared) interests and their motivation to cooperate within BRICS. Especially with regard to the identity/regional cooperation nexus, which has been relatively understudied, the process through which one causes the other matters (Börzel & Risse, 2016, p. 574). This study adopts a theory-testing approach to process-tracing. In other words, this study is concerned with testing whether the hypothesized causal mechanism is present and whether it functions as theorised (Beach & Pedersen, 2019, p. 9). Moreover, process tracing fits this study as it allows for in-depth analysis and contextual understanding.

## **4.3. Operationalisation**

Process tracing will allow for an examination of the causal mechanism. The analysis will employ several sources, including academic papers that explore common themes within BRICS, statements made by leaders and official BRICS websites. To make causal inferences, I will 'trace' the process by observing the empirical fingerprints (Beach & Pedersen, 2019, p. 4). These are the indicators or pieces of evidence that would confirm the steps in the process.

First, I will investigate the development of a *collective identity* among the BRICS countries. This involves analysing how Brazil, Russia, India, China and South Africa have collectively framed their identity on the global stage. To do this, I will analyse expressions of a collective identity among the BRICS countries as well as expressions of a collective identity relating to the Global South or developing countries. The focus is on the political discourse that may have had an effect on the identity that is shared by the BRICS countries. This will provide insights into the common themes and narratives that are used to describe the BRICS identity and how this collective identity differentiates them from other countries.



Second, I will examine how the collective identity shaped the *shared interests* of the BRICS countries. I will analyse the alignment of interests by examining statements made by the BRICS countries' leaders in the United Nations General Assembly (UNGA) from the end of the Cold War in 1991, which signified an important shift in multilateralism, to the first BRICS summit in 2009. The UNGA is an important framework for multilateralism. Meetings are institutionalised, and countries get the chance to articulate stances and vote on international issues. BRICS countries often take a unified stance on issues at the UNGA, based on the idea that they share the same interests (Ferdinand, 2014). The focus is on two themes: development and multipolarity. While BRICS lacks a clear agenda, research shows that these two are important fields of BRICS cooperation (Konyshev & Sergunin, 2022).

Third, I will look into the *operationalisation of cooperation* within BRICS. This involves examining how their shared interests, influenced by collective identity, translate into collaborative actions. I will explore institutional frameworks that were established as a result of BRICS cooperation as well as joint activities in global governance.

Fourth, I will examine how this translation into collaborative actions paved the way for BRICS to emerge as *virtual region*. The focus is on expressions of this virtual region, both from an internal perspective (individual BRICS countries or BRICS as grouping) and an external perspective (countries outside BRICS). Additionally, I will focus on BRICS' recent expansion and its relationship with the Global South.

## 5. ANALYSIS

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The cooperation between Brazil, Russia, India, China and South Africa presents a unique case of cooperation. This chapter aims to trace the causal process through which a collective identity shaped their interests and paved the way for the emergence of a virtual BRICS region.

### 5.1. Development of collective identity

In 2001, Jim O'Neill, then economist at Goldman Sachs, coined the acronym 'BRIC' to underline the economic potential of Brazil, Russia, India and China (O'Neill, 2001). This term played a pivotal role in shaping the group's collective identity. Although initially an economic term, it evolved into a political concept (Acharya, 2023). The acronym not only grouped the countries together in the global economic discourse but also provided a foundation for a shared identity as emerging powers. The countries eventually named their cooperation framework 'BRICS', following the inclusion of South Africa. The narrative created by Goldman Sachs around these countries connected with longer-standing narratives of the Global South.

The 'Global South' is not a region in the traditional sense, but a loose political and socio-economic concept. It refers to developing countries, most of which are located in Africa, Asia, Latin America and Oceania (UNCTAD, n.d.). Brazil, India, China and South Africa are part of the Global South. While the Global South may be seen as a 'region', representing shared values, histories and aspirations, it is not necessarily considered a geographical region.

The foundation of BRICS can be traced back to historical events and collaborations that fostered a sense of collective identity among them. The Bandung Conference, held in 1955, was a meeting of Asian and African states of which most were newly independent. The conference aimed at promoting Afro-Asian cooperation and opposing colonialism (Bandung Spirit, 2010). The conference laid the foundation for the Non-Aligned Movement (NAM), an international forum of countries that declared not to be aligned with or against any power bloc. It was founded in the context of a bipolar global order during the Cold War (Menon, 2022). Brazil, India, China and South Africa became part of the NAM, either as member or observer (NAM, n.d.)

The Five Principles of Peaceful Coexistence form the basis of the NAM: 1) respect for territorial integrity and sovereignty; 2) non-aggression; 3) non-interference; 4) equality and mutual benefit; and 5) peaceful co-existence (Choucri, 1969).

Since the end of the Cold War in 1991, the NAM has undergone a transformation. The NAM asked itself the question of whether its core principles, like national independence and opposition to colonialism, still apply to contemporary issues (NAM XII Summit, 1998). The movement has shifted its focus towards establishing multilateral relations and fostering unity among developing countries, particularly those in the Global South. One of its main tasks nowadays is to strengthen the Global South's voice and enhance the international influence of its members (Menon, 2022). Moreover, it shifted the focus to socio-economic challenges, including inequalities that they believe are the result of globalisation and neo-liberal policies. The NAM still opposes foreign interference, but it also sees economic underdevelopment as a threat, and tries to form one bloc against the West (NAM XII Summit, 1998).

Both the Bandung Conference and the establishment of the NAM marked an important moment in the articulation of the Global South's political and economic narratives. One particular goal has been present in this narrative: amplifying the voice of the Global South in global governance dominated by the Global North, especially countries in the West. The Bandung Spirit included key principles of non-interference and non-alignment, and the NAM further developed Global South solidarity to challenge the widening inequalities in developing countries while reducing their dependence on the Global North. The BRICS countries adopted these NAM principles, and significantly followed the narrative of a Global South. Generally, this narrative was instrumental in elevating South-South cooperation (Acharya, 2016). It provided countries in the Global South with a framework for collective action and a shared identity, which was crucial for the BRICS countries to come together.

Why did this particular subset of the NAM become its own a grouping? In part, this can be explained by Jim O'Neill's BRICS-label. The BRICS countries, especially Brazil, India and China, distinguished themselves from other developing countries through their economic potential (Thakur, 2014). The economic development of BRICS countries exceeds that of other countries in the Global South (International Monetary Fund, 2023). Additionally, the BRICS countries are different from other developing countries in for example country size, population size and military capacity. South Africa is perhaps an outlier in this respect, but their resource endowments and infrastructure might make up for this (Thakur, 2014). Moreover, all BRICS countries are leaders in their respective regions. Their shared status as emerging economies, and worldwide attention that followed, created the possibility for these countries to address global economic issues. BRICS emerged, alongside the NAM, as grouping with a distinct focus, more unequivocally aligned with the interests of its members.

## 5.2. Alignment of interests

The collective identity of the BRICS countries has been crucial in shaping their interests. It provided a common framework and set of principles that guided their approach to international relations. This section explores the interests of the BRICS countries by examining statements made by their leaders at the United Nations General Assembly (UNGA). Two narratives predominate these statements: 1) their advocacy for (economic) development in the Global South; and 2) their strive towards a multipolar world order.

The first narrative revolves around development issues and the North-South divide. Development is a common denominator for the BRICS countries, which becomes most apparent through their voting records at the United Nations (Zifcak, 2007). Research shows that the BRICS countries consequently take the same positions on those issues.

In the early 1990s, Brazil was mainly advocating for liberal values. Its president at the time, Collor de Mello, emphasized individual rights, pluralism and free enterprise (UNGA, 1991a). This view, which aligned with the liberal international order, suggested a recognition of the unilateral nature of international relations. As the decade progressed, Brazil began to articulate a more development-focused narrative. Lampreia, Brazil's former foreign minister, argued that the development agenda should not be limited to the North-South divide, but focus on economic cooperation through regional alliances (UNGA, 1995a). The shift in Brazil's stance was more pronounced under President Lula, who said that trade liberalisation should be a means for development and poverty reduction rather than an end in itself (UNGA, 2003).

In 1991, China's Foreign Minister Qian said that the Five Principles of Peaceful Coexistence would continue to guide Chinese foreign policy. Qian consistently advocated for the rights of developing countries in global economic decision-making processes (UNGA, 1994a). This stance is evident in China's consistent emphasis on discrepancies between the so-called Global North and Global South (UNGA, 1991b). Similarly, India consistently emphasized development issues. In 1997, Prime Minister Gujral also referred to the NAM and argued that its principles are still relevant because developing, previously colonised countries need a voice (UNGA, 1997). India emphasized the widening disparities among countries and advocated for equitable participation in global economic governance (UNGA, 1995b).

South Africa, after years of apartheid, positioned itself as the voice for the disadvantaged countries. President Mandela emphasized justice, peace and the need for inclusive global economic governance (UNGA, 1994b). Dlamini-Zuma followed this stance and called for reforms that would better represent the interests of developing countries (UNGA, 2000).

The second narrative, the shift towards multipolarity, reflects a desire among the BRICS countries to have a greater voice on the global stage, challenging dominance of countries in the West. This narrative revolves around discontentment with the liberal international order.

Russia, after the collapse of the Soviet Union, initially presented itself as a country aligning with democratic values and liberal reforms (UNGA, 1992). Yet, this stance gradually evolved. Kozyrev, Russia's then foreign minister, argued that equality between countries and respect for diverse cultures and traditions should be the basis for global security and prosperity (UNGA, 1995c). In the 2000s, Russia shifted its focus to multipolarity. Russia asserted that the 'new geopolitical situation' called for joint leadership to enhance representation in global governance (UNGA, 2007). While Russia is not part of the Global South, it found common ground with the BRICS countries in their rejection of Western-dominated global governance.

The inclination towards a multipolar world order was also evident in Brazil under President Lula. While Brazil adopted a liberal and unilateral view in the 1990s, the left-wing Lula advocated for multipolarity and equality among countries in the 2000s. Lula urged developing countries to cooperate with each other without interference by developed countries. However, the former president asserted that this stance was not aimed at confronting countries in the West. The goal was to work towards a just and multipolar world order (UNGA, 2008).

Both India and China have also been vocal in their desire for a greater voice in global governance. India emphasized the need to transform existing governance structures and include more developing countries in the United Nations Security Council (UNSC). Their criticism of unilateral policies seems to underscore this stance (UNGA, 2009). China emphasized the need for political and economic reform. In 2002, the country proposed several principles that should guide this reform, linking development issues to a stronger voice of the Global South (UNGA, 2002). However, China opposed India becoming a permanent UNSC member, which might be due to geopolitical rivalry, and China perceiving India as a threat to its own regional dominance (Jaishankar, 2023). China claims inclusiveness is vital, but remains wary of its own position.

In recent years, the BRICS countries displayed significant unity in their stances at the UNGA. This is also evident in quantitative research that examined voting cohesion among the BRICS countries (Ferdinand, 2014). However, their interests do not always align. One key area of divergence is human rights. China and India have aligned closely, typically choosing to abstain rather than oppose resolutions that criticise human rights records of countries. Russia and South Africa have also increasingly refrained from criticism, but not in all cases. In contrast, Brazil has been most likely to support resolutions (Ferdinand, 2014).

Evidently, not all BRICS countries share the exact same identity and interests. While the development narrative is strongly present in South Africa's speeches, the country is less involved with the multipolarity narrative. The opposite is true for Russia; the country shows strong support for a multipolar world order, but is less concerned with development issues in the Global South. This shows that identity and interests, despite great similarities, also have contradictions within BRICS. However, the analysis shows that the countries, especially Brazil, Russia and South Africa, have aligned their interests during the 2000s in favour of the development-multipolarity discourse, which was already more present during the 1990s in the discourse of China and India. The alignment of interests signifies their commitment to working together on common goals and reinforces their shared identity.

### **5.3. Operationalisation of cooperation**

The operationalisation of cooperation within the BRICS framework is a critical phase where collective identity and interests translate into collaborative initiatives and institutional structures. BRICS operates on a more flexible, informal basis, without a permanent bureaucracy or formal charter (Roberts et al., 2017). BRICS has a loose institutional form focused on areas of mutual interest. Cooperation is often issue-based and functional, focusing on specific areas like cultural exchange or infrastructure projects (Pant & Scholz, 2022).

Even though BRICS is generally less formalised and institutionalised, as compared to for example ASEAN, their cooperation gave rise to several multilateral initiatives. For instance, BRICS created the New Development Bank (NDB) and the Contingent Reserve Arrangement (CRA) in 2015. The grouping also launched numerous other collaborative initiatives, like the Business Council, the Parliamentary Forum and the Academic Forum. Since 2009, BRICS held annual summits between heads of state or government. However, meetings between officials at lower levels are irregular and not institutionalised (BRICS, 2023a).

Generally, BRICS operationalised their cooperation in two ways. First, the BRICS countries invested in building parallel institutions that reflect their interests (Roberts et al., 2017, p. 5). One of the most significant is the NDB. The NDB aims at mobilising resources for infrastructure and sustainable development projects in BRICS and other developing countries. Bangladesh and the United Arab Emirates became members in 2021, and Egypt joined in 2023. In its 2022-2026 strategy, the NDB expressed its desire to expand membership (New Development Bank, 2022). According to the NDB strategy, expansion would strengthen economic development in non-Western countries and lead to better integration of their interests

in the global economic order. The NDB can be seen as a means to increase economic growth, both within BRICS and the Global South, and an alternative to Western-dominated institutions. This resembles to the development-multipolarity discourse.

Second, the BRICS countries sought to increase their influence within existing multilateral institutions (Roberts et al., 2017, p. 5). The countries have called for increased voting rights and representation in existing institutions, like the IMF and UNSC. Moreover, BRICS attempts to leverage its collective strength to enhance their voice in existing global governance structures. An illustration of this is BRICS' unified stance in international climate change negotiations, such as those under the United Nations Framework Convention on Climate Change (UNFCCC). The BRICS countries jointly advocated for the CBDR-principle ('common but differentiated responsibilities'). The countries argued that, while all countries are responsible for addressing environmental issues, developed countries should take the lead due to their historical role. BRICS repeatedly emphasized the CBDR-principle; it was mentioned in every summit declaration except for the one in 2013 (Franklin, 2023, p. 22). Research shows that BRICS played a crucial role in shaping key provisions of climate change agreements (Franklin, 2023, p. 44). This demonstrates how BRICS, by working together, exerted substantial influence in shaping international agreements and policies.

#### **5.4. Virtual region**

The concept of a region typically implies geographical proximity. However, BRICS, comprising emerging economies from different continents, defies this conventional notion. The development of a collective identity and the alignment of their interests paved the way for collaborative actions among the countries. Essentially, the emergence of BRICS may resemble the emergence of a virtual region, where cooperation is not defined by a fixed geographic regional structure. BRICS is the result of an ideational process, following the collective identity that is strongly rooted in the Global South narrative.

From an internal perspective, the virtual nature of the BRICS region is, among others, expressed through significant coordination between the countries, the establishment of multilateral institutions (like the NDB, that supports South-South cooperation) and efforts to increase a community-feeling. During the 2023 summit, BRICS leaders expressed their interests in the development of a de-dollarised financial zone between their economies (Du Plessis et al., 2023). Additionally, the countries perceive that they have the same interests (Ferdinand, 2014) and meet 'on the margins' of international forums to coordinate their stances

and signify a front (BRICS, 2023b). Moreover, during the 2017 summit, BRICS leaders emphasized the importance of community-feeling. The leaders stated that people-to-people exchanges would be important in promoting ‘mutual understanding, friendship and cooperation among BRICS peoples’ (BRICS, 2023c). The BRICS countries invested in community-feeling, through for example cultural exchanges, sport events and academic collaborations.

BRICS cooperation moves beyond processes of globalisation and economic integration due to the ideational process. Their actions reflect a shared sense of belonging to the BRICS group. However, there are also differences among them, most notably in how they relate to the liberal international order. While Russia takes a more belligerent position, China and India consistently express the need to be cautious (Hiebert, 2023).

From an external perspective, countries outside BRICS often view this grouping as an emerging power block that seeks to challenge the dominance of Western countries and reshape global governance structures (Jash, 2017). There is both apprehension and interest in how the BRICS countries shape their role in global governance. While some argue that BRICS is a fallacy (e.g. Pant, 2013), others emphasize the significant role BRICS plays in political and economic governance (e.g. Du Plessis et al., 2023).

The BRICS countries’ shared identity and interests are strongly rooted in the Global South narrative. BRICS seems to take on the role of leader of the Global South, advocating South-South cooperation, and addressing challenges faced by developing countries. Membership expansion of BRICS underlines its role as leader among developing countries. On 1 January 2024, five countries officially joined BRICS: Egypt, Ethiopia, Iran, Saudi Arabia and the United Arab Emirates; Argentina declined the invitation (Du Plessis et al., 2023). All of them are part of the Global South and the NAM. During the 2023 summit, BRICS said it welcomes further expansion, as multiple other developing countries expressed interest in joining (BRICS, 2023c). Further expansion suggests that the BRICS identity, rooted in the Global South narrative, is gaining traction. Developing countries seem to identify with the BRICS narrative. However, with (even) more diverse members, maintaining cohesion may become more challenging. Yet, membership expansion would only strengthen the notion of BRICS as virtual region and its role as the leader and voice of the Global South.



## 6. CONCLUSION

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The aim of this thesis was to explore the emergence of BRICS. Despite dissimilarities between the BRICS countries, the development of a collective identity and the alignment of their interests paved the way for cooperation within BRICS. The analysis shows that their collective identity is rooted in the longer-standing narrative about the Global South and NAM-principles. The BRICS countries distinguished themselves through their significant economic potential.

A development-multipolarity discourse is identified. The countries view development not merely in economic terms but as a comprehensive approach to addressing inequalities and enhancing the welfare of the Global South. This perspective is underpinned by their belief that developing countries should have a greater voice in global governance. Their advocacy for multipolarity is intertwined with their development goals, as they seek not only economic growth and equity, but also a more inclusive world order. The development of a collective identity and alignment of interests paved the way for collaborative actions among the countries and for BRICS to emerge as virtual region, embedded in the Global South narrative.

The design of this study leads to some limitations. First, this study is specifically tailored to the BRICS context, which holds implications for its generalisability. BRICS is a stand-alone case in the study of regionalism. Second, the constructivist approach might lead to a bias in interpretation. The focus on UNGA statements could lead to a particular interpretation of their interests, which might not fully capture the complexity or entirety of factors influencing BRICS cooperation. Third, the focus on identity limits the study's scope. International relations are influenced by many external actors and factors, which are not considered.

There are several recommendations for future research. First, future research should focus on the outcome of regionalism in the case of BRICS. Constructivism not only emphasizes the significance of identity in shaping regional cooperation. It also offers an ideational standard for assessing the outcome of regionalism. Research should further examine the impact of BRICS, following the development-multipolarity discourse. Second, future research could employ empirical methods to complement the constructivist approach. This would provide a more objective basis to understand BRICS cooperation. Third, future research should explore the effect of BRICS' membership expansion more closely. What does it imply for BRICS and virtual regionalism? Fourth, comparative studies might provide insights into the uniqueness of BRICS and whether the patterns observed in BRICS apply to other groupings.

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