

Talk Left, Trade Right: BRICS, Gaza and the Limits of Southern Solidarity

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On September 12-13 2026, New Delhi will host the 18th BRICS summit under the theme 'Building for Resilience, Innovation, Cooperation and Sustainability,' draped in the language of "Humanity First" that Narendra Modi carried from Rio de Janeiro last year. The bloc will once again present itself as the institutional voice of the Global South: anti-hegemonic, solidaristic, committed to a fairer world order. Yet the host of this celebration of Southern solidarity is also Israel's single most reliable arms customer; a state whose corporations co-produce the drones that hover over Gaza. The distance between these two facts is not an embarrassing footnote to the BRICS project. It is the key to understanding what the project actually is.

The late Ruy Mauro Marini gave us the concept that best captures this

condition: sub-imperialism.

The BRICS states are not challengers to the imperial order but intermediate accumulators within it: economies marked by extreme corporate concentration, financialisation, dependence on commodity exports, and the super-exploitation of their own working classes. Their ruling classes seek a better seat at the table of global capital, not a different table. Patrick Bond's shorthand for the resulting political style is "talk left, walk right": the rhetoric of anti-imperialism deployed as the public relations of deepening integration. Gaza has been the most brutal test of this formula, and the bloc has failed it comprehensively.

The statement as alibi

The Rio declaration of July 2025 is routinely cited as evidence of the bloc's conscience: it denounced Israeli attacks on humanitarian operations, condemned starvation as a method of warfare, demanded a permanent ceasefire, rebuked the US-Israeli bombing of Iran. Read against what the member states were doing while the ink dried, the document is better understood as an alibi; the rhetorical instrument by which ten governments deepening their commerce with Israel purchased the appearance of solidarity at zero cost.

Lula, as host, named the genocide from the podium; the word was struck from the declaration, because a consensus of states whose corporations arm, fuel and provision Israel could not afford its legal implications. Negotiators reportedly struggled for days to produce language on Gaza, not because the facts were in dispute, but because every formulation had to be weighed against each member's balance of trade. What emerged was "grave

concern”: the diplomatic register in which a genocide is acknowledged and simultaneously filed away. The same document that could not name the crime in Gaza found no difficulty criticising Ukrainian strikes on Russian soil while passing over the invasion itself; a precise map of where each member’s interests lie. And India, the incoming chair and self-anointed voice of the Global South, had shortly before abstained on the very UN General Assembly resolution whose humanitarian phrasing the BRICS text borrowed. New Delhi would not vote for the words at the UN, then signed them at Rio, then went on selling. The declaration does not mark a limit the bloc is straining against. It marks the exact quantity of anti-imperialism its members require for domestic and Southern audiences, and not one clause more.

The host as paradigm

India is not an incidental offender but the paradigm case. According to SIPRI data, Israel supplied around 15% of India’s arms imports over 2021–25, its third-largest source; from the other side of the ledger, India absorbs well over a third of Israel’s total arms exports, its largest single market. The relationship survived October 2023 without a tremor. While Israel delayed more than $1.5 billion in arms deliveries to other clients, supply to India continued uninterrupted. As European states curtailed defence trade under domestic pressure, Israel’s arms industry pivoted eastward, and New Delhi obliged: in November 2025, the two governments signed a fresh memorandum deepening defence-industrial cooperation, co-production, artificial intelligence and cyber collaboration.

Nor is this merely a state-to-state procurement relationship. It is an alliance of capitals. The Adani Group’s joint venture with Elbit Systems has manufactured Hermes 900 drones in Hyderabad since 2016, the same Elbit whose systems

police the walls and checkpoints of occupied Palestine, while Adani operates the Haifa port through which Israel's war economy is provisioned. The Hindutva regime's ideological affinity with Zionism completes the picture, but the material foundation would stand without it: for India's ruling bloc, the Israeli connection is a circuit of accumulation, technology transfer and repression-expertise that no summit communiqué will be allowed to disturb. This is the chair that will preside over "Humanity First" in September.

A bloc-wide balance sheet

If India is the sharpest case, it is not a deviant one. The inventory of the genocide's BRICS suppliers is damning precisely in its ordinariness. In 2024, the year the International Court of Justice found a plausible case of genocide, nearly every BRICS member other than Iran expanded its trade with Israel, with energy and military goods leading the way. Chinese and Indian corporate management of the privatised Haifa container terminals has facilitated military imports, including thousands of Chinese-made drones deployed over Gaza. With Colombia's sanctions cutting off Israel's traditional coal supplier, it is South African, Russian and Chinese coal that now keeps the Israeli grid – and thus the war economy – running, while Brazilian crude covers a meaningful share of its oil.

South Africa's ICJ case deserves honest treatment within this picture, neither dismissed nor romanticised. The case, and Pretoria's role in the Hague Group, represent genuine and courageous lawfare – the single most consequential act of state solidarity with Palestine anywhere in the world since 2023. But it issued from one wing of a state whose ruling class was simultaneously profiting from the other side of the ledger. The coal leaving Mpumalanga for Israel moves through Glencore and African Rainbow Minerals, the latter

chaired by the billionaire brother-in-law of the president, with an estimated million dollars in profit accruing to Patrice Motsepe on a single 177,000-tonne shipment. The ICJ application and the coal manifests are products of the same state. That is not hypocrisy as a moral failing; it is, perhaps, the structural condition of a sub-imperial formation, in which the juridical conscience of the nation and the accumulation strategy of its bourgeoisie operate on separate tracks.

The institutional mirror

The Gaza contradiction is reproduced faithfully in the bloc's flagship institutions. The New Development Bank and the Contingent Reserve Arrangement were announced as the embryo of an alternative financial architecture; a decade on, the CRA has never been activated, and the NDB lends predominantly in dollars, courts Western credit-rating agencies – suspending its own 20% shareholder, Russia, to protect its New York ratings – and partners with the World Bank and IMF rather than confronting them.

Indeed, the bloc has become the guarantor of the Bretton Woods twins: the Kazan and Rio declarations pledge support for a "quota-based and adequately resourced" IMF – an institution in which, as CADTM has shown, the United States alone commands 16.49% of the voting rights against an 85% supermajority requirement – sole veto power. The BRICS petition for better seats in a boardroom to which Washington holds the only key. As Eric Toussaint has documented, the 126-point Rio declaration does not contain the word de-dollarisation even once. Putin himself has said the bloc has "not sought to abandon the dollar"; India opposes any common currency for fear of US trade reprisals; Pretoria considers de-dollarisation too dangerous to

attempt. When Donald Trump threatened an additional 10% tariff on countries aligning with “anti-American” BRICS policies, the episode revealed how cheaply the bloc’s dissent can be deterred; because the dissent was always calibrated, a bargaining posture within the dollar–arms order rather than a rupture with it.

This is the thread that ties the NDB’s dollar balance sheet to the drones over Gaza. A bloc whose members’ ruling classes accumulate within the circuits of imperial finance and the arms trade cannot adopt anti-imperialist positions, on Palestine or anything else, without acting against themselves. The absence of a unified position on the genocide is not a diplomatic failure to be corrected by better chairmanship. It is the truthful expression of what BRICS is: a coalition of competing capitalisms managing their insertion into the world market.

What solidarity would require

Genuine South-South solidarity has a concrete content, and it is measurable precisely by the demands BRICS structurally cannot make: a military embargo on Israel, an end to the coal and crude that power the war economy, the expulsion of complicit capital – Adani-Elbit, Glencore, the Haifa concessions – from public contracts, audits and repudiation of illegitimate debts rather than dollar-denominated lending under IMF surveillance, and reparative, not extractive, relations among the peoples of the South.

None of this will be tabled in New Delhi. It is being tabled elsewhere, by the dockworkers who refuse to load arms shipments, by the trade unionists and Palestine solidarity campaigns converging on Glencore’s offices with COSATU’s backing, by the networks of a “BRICS from below.”

Seventeen years on, the lesson of the bloc's encounter with Gaza is that Southern solidarity remains real, but its bearers are not the states assembling in September. They are the movements those states will keep outside the summit gates.

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About the Author



Sushovan Dhar

Author

Editorial Board Member of Alternative Viewpoint

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