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Role of Middle Powers in a Multipolar World: A Study of India, Turkey, and Brazil

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Abstract

The new international order following the Cold War is gradually shifting towards a situation characterized by a more dispersed power structure, in which states that are not superpowers or small states affect events through diplomacy, alliance formation, and selective alignment. In this context, this research paper seeks to assess the role that the three prominent middle powers of India, Turkey, and Brazil play in a multipolar world. Through a qualitative comparative case study using structured comparison and based on secondary data provided by the World Bank and SIPRI, the paper examines the material basis, alignment behavior, and mediation by the states in question between 2010 and 2022. It is found that all three states engage in strategic autonomy by means of hedging and issue alliances; however, each state uses different institutional basis for its role as a middle power: India depends on multi-alignment and leadership of the Global South, Turkey on NATO membership with transactional mediation, and Brazil on normative diplomacy and group politics.

***Keywords**: Middle Powers, Multipolarity, Strategic Autonomy, Hedging, India, Turkey, Brazil.*

Introduction

International relations theorists have been organized in terms of great power rivalry for the greater part of the twentieth century. In the context of bipolarity and American dominance, other actors have played the roles of followers, balancers, or spectators (Waltz, 1979). The current situation looks different. The growing influence of China, the resurgence of Russia, the loss of economic weight by Western countries, and the conflict in Ukraine have created an environment where one actor is unable to establish its own rules of the game (Acharya, 2014). Under these circumstances, medium powers find themselves able to gain certain flexibility. They are being solicited by competing blocs, are welcome participants of different organizations, and are often expected to serve as bridges between them.

This study examines three such countries. Although there are geographical, political and historical differences between India, Turkey and Brazil, they all have been considered emerging powers that seek greater representation in global governance (Hurrell, 2006; Narlikar, 2010). The main research question posed in this paper is how India, Turkey, and Brazil employ aligning themselves, diplomacy and mediation as tools of exercising influence in a multipolar world. There are three specific objectives of the study. First, to define the term 'middle power' in relation to emerging powers. Second, to compare the material foundations of their foreign policy. Third, to determine how they translate limited material capability into influence in international diplomacy. Section 2 defines the concept of a middle power; Section 3 describes the methodology, Section 4 compares material foundations, Section 5 presents the cases and Section 6 through 8 summarize and discuss findings and conclusions.

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Conceptual Framework

The middle power concept is composed of three distinct approaches. The first approach is the functional approach to middle power, where a state has sufficient resources to matter in international affairs without having enough capability to exercise dominance (Holbraad 1984). The behavioral approach is the approach by Cooper et al. (1993) that focuses on the preferences of multilateralism, coalitions, and niche diplomacy. The third approach is the hierarchical approach, which ranks states based on certain objective measurements such as national economic output and military spending. Each has its strengths and will be used in this research paper.

In his attempt to refine the debate on middle powers, Jordaan (2003) identifies two types of middle powers; traditional middle powers, which include Canada and Australia, and the emerging middle powers that include Brazil, India, and Turkey. The traditional middle powers are wealthier, socially egalitarian and supporters of the existing Western hegemony, while the emerging middle powers are regionally influential and have unequal societies, and thus they are generally seeking reforms within the existing hegemonic order and ambivalence towards Western hegemony.

Not surprisingly, closely related is the idea of strategic autonomy, which allows making decisions regarding foreign policy according to one's own interests independent from any particular partner. Vigevani and Cepaluni (2007) identify the Brazilian approach as autonomous through diversification when a state expands its partnerships in order to decrease vulnerability. Mohan (2003) and Jaishankar (2020) provide similar reasoning in case of India, while Kutlay and Öniş (2021) study the Turkish attempt to maintain autonomy being simultaneously embedded in Western institutions. Under the conditions of multipolarity, hedging is understood as the concrete manifestation of autonomy, which implies retaining flexibility in dealing with several powers simultaneously. Therefore, in the context of this research, hedging, coalition-building, and mediation will be considered as observable manifestations of the middle-power agency.

Finally, the term of multipolarity requires a brief definition. It is used to define the distribution of power where not one or two but several states can influence results, and alliances are flexible rather than stable (Acharya, 2014). This system enhances the importance of the swing states, as the changing position of an ally affects the balance of power among the rival blocs. The middle powers not constrained by any binding alliances have thus gained from this rivalry, as long as they can provide something to either side.

Research Methodology

The research design is qualitative comparative case studies. Case study methodologies are used in how and why questions when researcher cannot control events and the research objective is to uncover the mechanism and not to measure the average (Yin, 2018). The particular methodology is structured focused comparison (George & Bennett, 2005). This methodology is structured as it poses the same questions to all the cases, and focused as it concentrates only on some aspects of the cases and does not provide full description.

The case selection will be based on the logic of diversity. The reason is that all three states could be considered as emerging middle powers, but there are differences between them in terms of variables which are relevant to the research question. Thus, for instance, India does not have any formal military ally, Turkey is a NATO state bordering with Russia and Middle East, Brazil is a regional hegemon but does not have any security rivals. Thus, if the similar strategy is found, then it is more robust.

The validity is enhanced through three techniques. Each piece of evidence supporting the argument is sourced from at least two different sources where possible; similar coding criteria are used to analyze all three cases, and alternative explanations such as behavioral difference because of regime differences, not institution-based actions, are examined in the discussion. Since the analysis uses only the available literature, there was no need to collect any primary data.

Three common questions are asked about each case. What kinds of resources does the state possess in order to conduct its foreign policies? In what way has the state positioned itself among rival powers, especially in the wake of Russia's invasion of Ukraine in 2022? What roles has the state played as a mediator and convenor? The time period under consideration is 2010-2022. All data is secondary. The quantitative indicators include the Gross Domestic Product from the World Bank (2022) and the Military Expenditure from the Stockholm International Peace Research Institute (Tian et al., 2022). Qualitative data includes scholarly literature, books, and UN documents, which are then coded into a

comparison matrix (Table 1). The problem here is that with only three instances there is no statistical basis for generalization, and the reliability of the literature will determine the interpretation of the data. Numbers are approximations.

Material Foundations

Material power is the first consideration when assessing power claims even though it may not be the last. Figure 1 shows the comparison among the three countries in terms of two common measures of power, that is, economic size and military expenditure. Both these measures have their shortcomings as they do not take into account diplomacy skills.

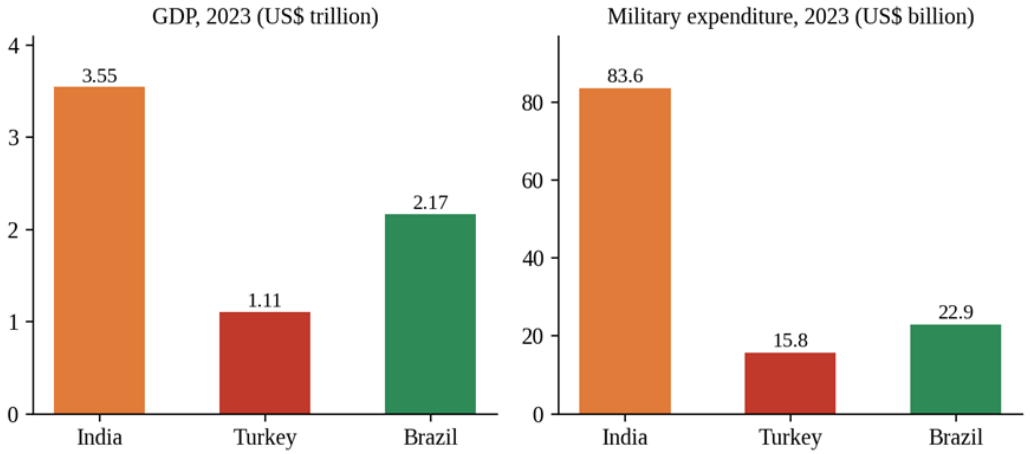


Figure 1: Economic Size and Military Expenditure of India, Turkey, and Brazil, 2022 (Rounded)

Sources: World Bank (2022); Tian et al. (2022)

India is the largest in terms of GDP with an estimate of about 3.5 trillion US dollars for 2022. The other two have approximately 2.2 trillion and 1.1 trillion US dollars, respectively (World Bank, 2022). Also, the military budget of India stands at approximately 84 billion US dollars compared to Brazil at about 23 billion and Turkey at about 16 billion (Tian et al., 2022). However, size alone does not guarantee influence. As depicted in Figure 2, the income per capita flips the positions.

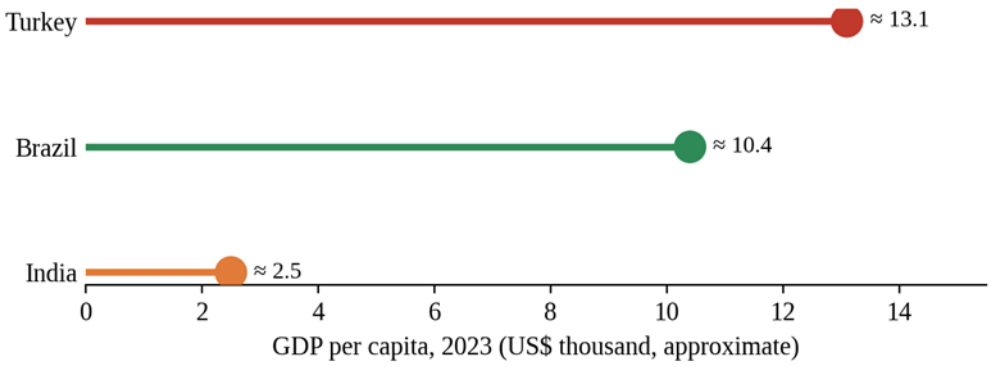


Figure 2: Approximate GDP Per Capita, 2022

Source: World Bank (2022), rounded

The per capita income in Turkey and Brazil is several times greater than that of India. While India's size lends it influence in the economic and demographic arenas, the country's requirements of development impose constraints on how much it can afford to pursue an external-oriented policy. Turkey uses its greater income and advanced defense industry to make up for its lack of economic weight, whereas Brazil uses its assets to pursue regional leadership and diplomacy.

Case Analysis

- **India: Multi-alignment and Global South Leadership**

India's foreign policy is shifting from Cold War-era non-alignment towards a multi-alignment approach where New Delhi has ties with several countries according to their issue-based interest (Jaishankar, 2020; Mohan, 2003). India has joined the Quad, which consists of the US, Japan, Australia along with itself, and it is also part of BRICS. It purchases its military hardware and energy from Russia. At the UN General Assembly vote held in March 2022, India abstained from voting for Russia's withdrawal from Ukraine but increased its purchases of reduced price Russian crude oil amid calls for dialogue. This is hedging at its finest: India stayed out of any kind of alignment but got benefit from both parties.

India has also engaged in a convening role. As host of G20 Summit 2022, it organized Voice of the Global South Summit and managed to get the AU membership in the G20 group. All these moves allowed India to position itself as the voice of developing nations at a minimal cost in terms of resources but with some diplomatic advantage. What restricts India is its long-standing competition with China, making India dependent on other countries like the US despite its claims of autonomy suggest.

India's policy is also apparent in the conduct of economic diplomacy. India has entered into trade agreements with certain countries but has not been a member of any regional trade groupings, and India leverages its big domestic market as an economic bargaining chip. All of these actions are in line with the perspective that states leverage their domestic market size to get better deals (Narlikar, 2010).

- **Turkey: NATO Membership and Transactional Mediation**

The case of Turkey, on the other hand, is different since it is a member of NATO, an applicant for European Union membership since 1999, and a state that has its own regional ambitions. According to Öniş and Kutlay (2017), it is a paradoxical middle power whose influence expands with activism and connectivity but is undermined by internal institutional problems and overreach. Since 2010, the Turkish policy has been swinging back and forth between alignment with the West and independent foreign policy, which Kutlay and Öniş (2021) describe as a quest for strategic autonomy in a post-Western world.

The example of the Ukraine conflict confirms it. Turkey supported the March 2022 General Assembly resolution on Ukraine, provided arms to Ukraine, and used the Montreux Convention to ban warships from passing through the Turkish Straits. On the other hand, it opted not to join the Western sanctions against Russia and maintained its economic ties with Russia. Turkey thus exploited this neutral stance by negotiating, through the United Nations, the Black Sea Grain Initiative of July 2022, through which Ukrainian grain exports could resume via the sea (United Nations, 2022). This influence was possible due to Turkey's geographic location and the fact that it could communicate with both parties, but this was only circumstantial and required continued need for an intermediary from both parties.

- **Brazil: Diversification and Normative Diplomacy**

The foreign policy of Brazil is historically characterized by multilateralism, developmentalism, and a non-aggressive dispute settlement strategy. During the time of President Lula da Silva's first presidency, Brazil's strategy for autonomy involved diversification and strengthened its relations with other developing states via IBSA, BRICS, and Mercosur while maintaining its friendly relationship with the West (Vigevani & Cepaluni, 2007). According to Stuenkel (2015), Brazil could use BRICS to advance its reformist agenda without challenging the West. In 2010 Brazil and Turkey co-signed an agreement on nuclear fuel swap with Iran; this example demonstrates the aspirations and dangers of middle-power diplomacy, as this proposal was refused by other major powers and sanctions were imposed.

In response to Russia's annexation of Ukraine, Brazil voted for the March 2022 General Assembly resolution but abstained from imposing sanctions. Following Lula's re-election in 2022, Brazil helped to create a grouping of Global South countries favoring peace on the Ukrainian issue, and in 2022 it became part of China in issuing common principles for a diplomatic solution. While these actions did little to change the situation, they helped improve the image of Brazil as a mediator. The strength of Brazil in this case is the presence of a normative image and the absence of regional security concerns; its weakness is the lack of coercive tools and internal instability.

Comparative Findings

Table 1 summarises the comparison using the standard questions set out in the methodology. Cells are colour-coded by country.

Table 1: Comparative Matrix of Middle-Power Strategies (2010 to 2022)

Dimension	India	Turkey	Brazil
Alignment posture	Multi-alignment; no formal ally; Quad and BRICS member	NATO member; autonomous action; EU candidate	Non-aligned in practice; BRICS and Mercosur anchor
UN vote on Ukraine, March 2022	Abstained	In favour	In favour
Sanctions on Russia	Not imposed	Not imposed	Not imposed
Mediation role	Convener (G20, Global South summits)	Broker (Black Sea Grain Initiative)	Coalition builder (peace proposals; 2010 Iran declaration)
Core strategy	Hedging	Transactional balancing	Diversification and normative diplomacy

Source: Author's compilation from secondary sources

Two trends emerge. One, not one of the three countries imposed sanctions on Russia, while all three voted in favor of condemning the invasion, although India abstained in the General Assembly. This shows that there are many ways of hedging – while India was avoiding polarizing votes, Turkey and Brazil were condemning the invasion but were rejecting any form of economic confrontation. Two, each country's mediator status is determined by its institutional position. Turkey has unique geographic position and is an ally of NATO, thus being able to broker among belligerent parties; India is large in size and leads the G20, therefore serving as a convener, while Brazil has normative authority and can build coalitions.

The matrix shows the trade-off between autonomy and security. Turkey has the highest degree of security guarantees through NATO but the lowest autonomy, while India has the lowest formal obligations but faces a serious security threat coming from a neighboring great power. Brazil does not face such pressures and thus puts more emphasis on normative over hard power diplomacy.

Discussion

The comparative analysis backs three points of view. First, hedging should be considered a rational approach to multipolarity, not inconsistency. In the competition between powers for partners, a middle power that allies with one will lose its leverage in bargaining, while one that holds out options will get concessions from all sides (Hurrell, 2006). Second, institutional anchors define the way in which autonomy is expressed. Turkey's membership in NATO limits its flexibility less than India's and Brazil's positions limit theirs, but provides Ankara with weight in bargaining within the alliance.

An alternative explanation is that the regime determines the behavior. India and Brazil are democracies, Turkey's regime has centralized during recent years, and all three followed the same approach to sanctions. It shows that the role of external position and the interest of maintaining economic connections outweighs the effect of regime type. Three cases are insufficient to prove any point, but the evidence favors the structural over the ideological approach.

Lastly, middle-power mediation will work only if it is accepted by great powers. The 2022 grain mediation succeeded since Russia, Ukraine, and the UN all had a stake in its success, whereas the 2010 Iran declaration failed since the great powers were uninterested in its success. This means that influence depends on context. For practitioners, the lesson learned is that the ability to convene and credibility with all parties involved is more important than a particular capability indicator. The limitations of this study are the limited sample size as well as use of secondary data, and future research can incorporate quantitative data such as the UN General Assembly voting alignment index or trade diversification indicators.

Conclusion

The cases of India, Turkey, and Brazil indicate that middle powers are anything but submissive actors in a world order that is becoming increasingly multipolar. In each case, the practice of hedging, coalition formation, and mediation has been employed to expand the strategic space of manoeuvre, although the anchor varies for each of them: multialignment for India, NATO membership with transactional diplomacy for Turkey, and normative multilateralism for Brazil. While material size determines the tools rather than the strategy of middle powers, their power continues to be conditional on their acceptance by larger powers. In an increasingly diffused international order, the ability to convene,

mediate, and hedge will probably continue to be the most important source of middle-power influence. This implies that any attempt to impose alignment on such powers is likely to prove futile, while issue-specific cooperation would provide a better approach.

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