

UDC 327.8

IRSTI 11.25.91

<https://doi.org/10.48371/ISMO.2025.60.2.015>

STRATEGIC HEDGING BY MIDDLE POWERS IN A FRAGMENTED BIPOLAR ORDER

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Abstract. This article reconceptualizes strategic hedging as a rational, multidimensional, and sustainable foreign policy strategy pursued by middle powers in response to a fragmented bipolar order. Using structured-focused comparison, it analyzes ten Global South countries, India, Türkiye, Indonesia, Brazil, South Africa, Mexico, Argentina, Nigeria, Saudi Arabia, and Thailand, to evaluate the causal impact of three enabling conditions: structural asymmetry, institutional pluralism, and identity elasticity. The findings reveal that middle powers strategically exploit asymmetric dependencies, diverse institutional memberships, and discursive flexibility to hedge across economic, security, and institutional domains. The study offers a mid-range theory that integrates material, institutional, and ideational mechanisms to explain variation in the scope, depth, and durability of hedging behavior across cases.

Key words: strategic hedging, middle powers, multipolarity, institutional pluralism, identity elasticity, Global South, foreign policy, strategy

Introduction

In the wake of the Russia-Ukraine war and the intensifying U.S.-China rivalry, many middle powers from the Global South have adopted strikingly ambiguous foreign policy positions. Contrary to the predictions of conventional international relations (IR) theory, these states have avoided clear alignment with either side of the emerging bipolar order. Countries such as India, Turkey, Indonesia, Brazil, and South Africa abstained from sanctioning Russia, continued diplomatic engagement with rival great powers, and maintained participation in both Western-led and alternative multilateral institutions. Their behavior reflects not passivity or indecision but a pattern of multidomain engagement and rhetorical ambiguity.

This trend presents a fundamental puzzle. If polarity sharpens incentives for alliance formation, and if institutional affiliation or identity should constrain policy choices, why do so many middle powers actively diverge across economic, security, and institutional domains? Moreover, why does the intensity and durability of such divergence vary across seemingly comparable states?

Existing theories offer only partial explanations. Realism's binary logic of balancing and bandwagoning cannot account for sustained engagement with multiple rival powers. Liberal institutionalism assumes norm convergence within regimes but

overlooks the instrumental use of institutional pluralism. Constructivism emphasizes identity-based constraints but tends to view discursive inconsistency as incoherence, not strategy. Meanwhile, much of the hedging literature remains regionally and conceptually narrow, focusing primarily on Southeast Asia without offering a generalizable theory of sustained ambiguity.

This article addresses that gap by reconceptualizing strategic hedging as a rational, multidimensional strategy pursued by middle powers operating under conditions of fragmented bipolarity. It argues that hedging behavior emerges and varies based on the interplay of three enabling conditions: structural asymmetry (material dependence on different powers across distinct domains), institutional pluralism (simultaneous participation in ideologically divergent organizations), and identity elasticity (discursive capacity to perform multiple diplomatic roles). When these conditions align, states are more likely to engage in calibrated ambiguity across security, economic, and institutional arenas.

The central objective of this study is to explain variation in the scope, depth, and durability of strategic hedging. It proposes a mid-range causal theory rooted in the interaction of material, institutional, and ideational mechanisms, and tests it through a structured comparison of ten analytically selected middle powers: India, Indonesia, Turkey, Brazil, South Africa, Mexico, Argentina, Nigeria, Saudi Arabia, and Thailand.

This article contributes to three key debates. First, it advances a generalizable theory of hedging that applies beyond Southeast Asia and accounts for variation in behavior. Second, it bridges theoretical traditions in IR by integrating structural, institutional, and discursive explanations into a single framework. Third, it repositions middle powers as autonomous strategic actors capable of maneuvering within and shaping the emerging world order through sustained ambiguity.

Materials and Methods

This study employs a structured-focused comparative research design to test its mid-range theory of strategic hedging. This method, developed by George and Bennett (2005), is particularly well-suited for hypothesis-driven analysis across a moderate number of cases. It enables the systematic application of a common theoretical framework while allowing for variation in outcomes and causal mechanisms. The goal is not universal generalization but theoretical refinement through comparative inference.

The empirical focus is on ten middle powers from the Global South: India, Indonesia, Turkey, Brazil, South Africa, Mexico, Argentina, Nigeria, Saudi Arabia, and Thailand. These cases were selected based on their shared structural position, states with moderate material capabilities and autonomous foreign policy traditions, but differing patterns of hedging behavior. All ten countries qualify as middle powers according to standard indicators: GDP size, regional influence, diplomatic outreach, and multilateral participation.

Importantly, the cases are not limited to a single region. They span Asia (India, Indonesia, Thailand), the Middle East (Turkey, Saudi Arabia), Africa (South Africa, Nigeria), and Latin America (Brazil, Mexico, Argentina). This cross-regional design

enables the theory to be tested beyond the often-analyzed Southeast Asian context and ensures that findings are not artifacts of local strategic cultures or region-specific institutions.

All selected cases meet the scope conditions of the theory: 1) they operate in a fragmented international system marked by institutional proliferation and geopolitical competition; 2) they are exposed to multiple great powers (primarily the U.S., China, and Russia); 3) they possess the diplomatic capacity to diversify their external alignments.

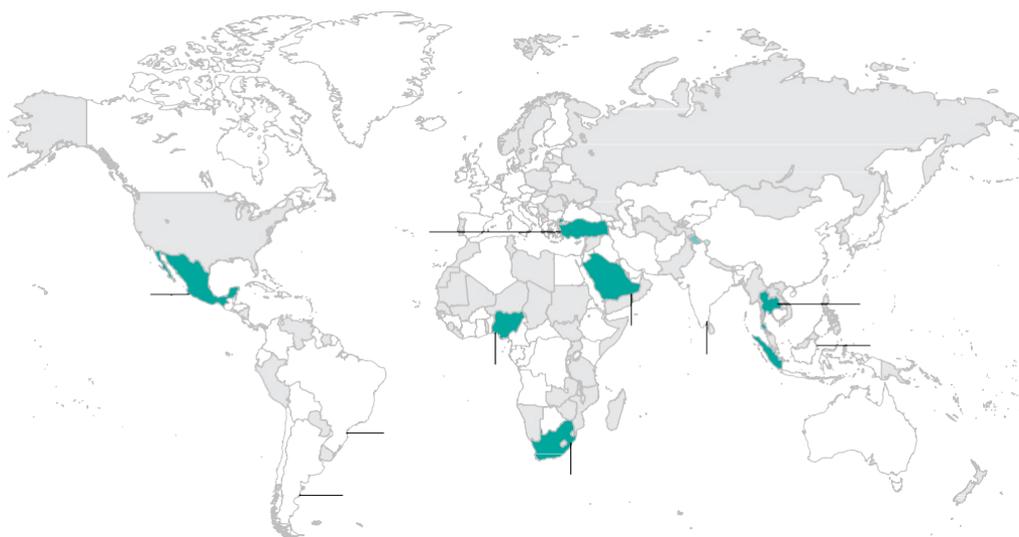


Figure 1. The Ten Middle Powers

The inclusion of variation in hedging behavior, from deep and sustained ambiguity to clear alignment, facilitates both positive and negative testing of the hypotheses. For instance, Mexico, widely considered to be firmly embedded in the U.S.-led order, serves as a crucial negative case. By contrast, India and Turkey represent high-intensity hedgers, allowing the theory to be tested at its upper bound.

Unit of Analysis and Time Frame

The unit of analysis is the state, and the main focus is on foreign policy behavior across three domains:

1. Security (e.g., defense cooperation, arms imports),
2. Economics (e.g., trade, infrastructure, energy ties), and
3. Institutional alignment (e.g., membership in formal and informal multilateral forums).

The time frame of analysis spans 2010 to 2023, capturing a period of systemic turbulence marked by the rise of U.S.–China competition, the COVID-19 pandemic, and the Russia–Ukraine war. This window provides a meaningful test of whether hedging is durable under external pressure and strategic shocks.

Empirical data are drawn from harmonized secondary sources, including: 1) UN Voting Behavior on the Russia-Ukraine War; 2) Economic Alignment Data: Trade and Investment Exposure; 3) Security and Technology Cooperation; 4) The Cooperation Under Autonomy dataset, which catalogs informal intergovernmental organization (IIGO) membership and participation, capturing institutional pluralism.

Each case is evaluated based on the presence or absence of the three enabling conditions, structural asymmetry, institutional pluralism, and identity elasticity, and scored across the three dimensions of hedging: scope, depth, and durability. This framework allows for both within-case analysis (how each mechanism operates in a given context) and cross-case comparison (how combinations of mechanisms produce different levels of hedging).

This research design ensures internal coherence, theoretical symmetry, and empirical tractability, offering a robust basis for testing the causal logic of strategic hedging in the Global South.

Operationalization of Variables

To evaluate the causal logic of strategic hedging, the dependent and independent variables in this study are disaggregated into observable indicators and systematically coded using a uniform ordinal framework. The operationalization strategy draws on original comparative analysis of publicly available data from four principal sources: 1) UN Voting Behavior on the Russia–Ukraine War; 2) Economic Alignment Data: Trade and Investment Exposure; 3) Security and Technology Cooperation; 4) The Cooperation Under Autonomy dataset, which catalogs middle power participation in informal regional and transregional forums. This combined dataset captures both formal and informal dimensions of institutional pluralism and foreign policy behavior. All data were synthesized and recoded into original summary tables to ensure comparability across the ten middle power cases.

DV: Strategic Hedging Behavior

Strategic hedging is operationalized as a multidimensional outcome encompassing three interrelated components: domanial scope, depth of divergence, and temporal durability. Each dimension is coded on an ordinal scale ranging from 0 to 2.

Domanial Scope refers to the number of foreign policy arenas (security, economics, institutions) in which a state maintains divergent alignments.

Score of 2: Engagement with rival great powers in ≥ 2 domains.

Score of 1: Divergence in only one domain.

Score of 0: No observable divergence; exclusive alignment.

Depth of Divergence captures the substantive intensity of engagement with rival actors in each domain.

Indicators: Arms transfers, bilateral trade volumes, energy infrastructure, Huawei 5G integration, institutional leadership.

Score of 2: Deep entanglement with both U.S./Western and Chinese/alternative systems.

Score of 1: Tactical or moderate divergence.

Score of 0: Shallow or exclusive dependence on one pole.

Temporal Durability assesses whether hedging behavior is sustained over time (2010–2023).

Indicators: Repeated abstentions, consistent parallel partnerships, lack of realignment or alliance shift.

Score of 2: Durable and sustained behavior across ≥ 4 years.

Score of 1: Episodic or unstable hedging.

Score of 0: Clear pivot or reversal.

Each case's strategic hedging profile is constructed by triangulating across these three dimensions to classify the intensity and coherence of the strategy.

IVs

This study identifies three enabling conditions hypothesized to support hedging: structural asymmetry, institutional pluralism, and identity elasticity. Each is operationalized independently and coded on the same 0–2 ordinal scale.

Structural Asymmetry

This variable capture whether a state’s strategic dependencies are distributed asymmetrically across multiple great powers.

Indicators: Arms suppliers, top trade and FDI partners, energy relationships, technological infrastructure.

Score of 2: Cross-cutting dependencies across ≥ 2 distinct domains.

Score of 1: Partial or sectoral asymmetry.

Score of 0: Heavy or exclusive dependence on a single pole.

Institutional Pluralism

This variable measure participation in ideologically divergent institutional arrangements, encompassing both formal IGOs and informal IIGOs.

Indicators: Dual membership in Western-led and counter-hegemonic institutions (e.g., G20 + BRICS, Quad + SCO); involvement in informal groupings such as IBSA, NAM, D-8, MIKTA, and ASEAN+.

Score of 2: Active and recurrent participation in both blocs across multiple domains.

Score of 1: Limited or asymmetric engagement.

Score of 0: Exclusive alignment with one institutional camp.

Institutional pluralism is interpreted as a mechanism of compartmentalization and redundancy, enabling states to sustain issue-specific ambiguity.

Identity Elasticity

This variable captures the extent to which a state performs flexible foreign policy identities across venues to justify divergent alignments.

Indicators: Rhetorical shifts between civilizational, democratic, post-colonial, or Global South identities; use of sovereignty and non-alignment frames; ability to maintain credibility across audiences.

Score of 2: High elasticity; consistent identity switching across settings.

Score of 1: Moderate flexibility; context-bound identity adjustment.

Score of 0: Fixed, monolithic, or ideologically constrained identity.

Discursive flexibility serves as the legitimation mechanism that allows middle powers to reconcile strategic ambiguity with reputational coherence.

Table 1. Variable Coding Scheme

Variable	Definition	Indicators	Coding Scale
Strategic Hedging (DV)	Multidimensional pattern of parallel engagement across rival powers	Composite of scope, depth, and durability	0–2 composite scale (summed or typologized)
Domainal Scope	Extent of divergence across ≥ 2 foreign policy domains	Divergent alignments in multiple domains (e.g., arms, trade, forums)	0 = none, 1 = partial, 2 = full

Variable	Definition	Indicators	Coding Scale
Depth of Divergence	Substantive entanglement with rival powers in key domains	Huawei 5G presence, arms suppliers, trade/FDI flows, defense pacts	0 = shallow, 1 = moderate, 2 = deep
Temporal Durability	Sustained hedging behavior over the 2010–2023 period	UN voting patterns, policy consistency, long-term institutional alignment	0 = episodic, 1 = moderate, 2 = sustained
Structural Asymmetry (IV1)	Cross-domain dependencies on different great powers	Top arms supplier ≠ top trade partner; China–U.S. dual dependence	0 = single-pole, 1 = partial, 2 = cross-cutting
Institutional Pluralism (IV2)	Simultaneous participation in ideologically diverse IGOs/IIGOs	Membership in G20, BRICS, SCO, NAM, D-8, MIKTA, ASEAN+	0 = exclusive bloc, 1 = asymmetrical, 2 = full pluralism
Identity Elasticity (IV3)	Capacity to perform multiple foreign policy identities across venues	Shifts between Global South, civilizational, democratic, post-colonial frames	0 = fixed identity, 1 = moderate, 2 = high elasticity

This study employs a structured-focused comparison methodology, which offers an optimal balance between theoretical rigor and empirical manageability for evaluating mid-range theories across a moderate number of cases. The approach ensures three analytical advantages. First, it provides theoretical symmetry, as all cases are assessed using a uniform causal framework. Second, it enables cross-case comparability through the consistent application of operationalized indicators, allowing for controlled variation. Third, it ensures empirical coherence by drawing from harmonized, cross-national data sources rather than piecemeal country-specific archives.

The primary empirical foundation is drawn from 1) UN Voting Behavior on the Russia–Ukraine War; 2) Economic Alignment Data: Trade and Investment Exposure; 3) Security and Technology Cooperation. Their comprehensive coverage across ten middle powers minimizes the inconsistencies that would arise from compiling disparate primary sources. Supplemented by the Cooperation Under Autonomy dataset on IGO participation, this approach facilitates a consistent and analytically tractable examination of strategic hedging across diverse geopolitical contexts.

Literature Review and Theoretical Framework

Conventional international relations theories offer limited explanatory power when it comes to understanding the strategic ambiguity of middle powers in today’s fragmented global order. Realism, liberal institutionalism, and constructivism each highlight important drivers of foreign policy behavior, yet none adequately account for the persistence and variation of strategic hedging.

Neorealist and offensive realist approaches view states as constrained by the structure of the international system, which compels them to balance against or bandwagon with dominant powers to ensure survival (Waltz, 1979; Mearsheimer, 2001). Within this binary framework, middle powers are treated as reactive actors, expected to align with stronger states based on threat perceptions or opportunity structures.

However, the empirical record diverges sharply from these predictions. Countries such as India, Turkey, and Indonesia engage simultaneously with rival great powers, maintaining defense ties with the United States while deepening economic and diplomatic relationships with China and Russia. This multidomain ambiguity is neither balancing nor bandwagoning; rather, it is a deliberate effort to avoid entrapment and preserve autonomy. Realist theories also struggle to explain cross-regional variation: why do similarly situated middle powers hedge differently? By flattening agency and overemphasizing polarity, realism cannot explain the strategic maneuvering evident in Global South diplomacy today.

Liberal institutionalist perspectives emphasize the constraining effects of international institutions. States are expected to internalize institutional norms and align their behavior accordingly (Keohane, 1984; Ikenberry, 2001). Middle powers, in this tradition, are cast as ideal multilateralists, promoting liberal values, pursuing soft power, and reinforcing rule-based global governance. The behavior of traditional Western middle powers such as Canada, Australia, or the Nordic countries seems to confirm this logic.

Yet emerging middle powers in the Global South display a more instrumental approach to multilateralism. Countries like Brazil, Turkey, and South Africa engage both Western-led and alternative forums, not to converge toward a shared normative agenda, but to maximize flexibility and geopolitical leverage. Institutional pluralism becomes a tool for compartmentalizing relationships, not a path to norm diffusion. As Mahrenbach (2019) and Morse and Keohane (2014) show, “selective multilateralism” and “contested multilateralism” have become defining features of middle power behavior, enabling states to resist institutional entrapment while preserving diplomatic reach. Liberal institutionalism, in assuming norm convergence, overlooks this strategic functionality.

Constructivist theories, by focusing on identity and norm-driven behavior, contribute valuable insights into how states interpret their interests and roles (Wendt, 1999; Finnemore & Sikkink, 1998). In this tradition, middle powers are often portrayed as “norm entrepreneurs” or “good international citizens” whose foreign policy reflects stable, value-driven identities.

However, many contemporary middle powers exhibit discursive agility rather than identity coherence. States such as Indonesia and Turkey adopt multiple roles depending on the forum and audience: democratic partner, Islamic actor, Global South leader, or neutral mediator. These shifts are not signs of confusion but deliberate performances used to justify divergent alignments. Mainstream

constructivism often treats this flexibility as an analytical problem, labeling it “instability” or “role incoherence”. This study, by contrast, views such identity elasticity as a strategic resource.

Emerging critical and post-structuralist approaches to constructivism (e.g., Pouliot, 2010; Cornut & Pouliot, 2015) suggest that identity can be performed, sequenced, and localized depending on context. These tools are especially relevant for middle powers seeking to legitimize multidomain divergence while avoiding reputational backlash. Yet these insights remain underutilized in hedging theory and broader IR debates.

Dominant IR theories tend to misread or overlook the logic of strategic hedging. Realism overstates structural constraint, liberalism misinterprets institutional engagement, and constructivism under-theorizes discursive flexibility. This article builds on and departs from each paradigm by treating hedging not as a deviation from theoretical expectations but as a rational strategy enabled by specific material, institutional, and ideational conditions.

The conventional understanding of middle powers, shaped largely by the behavior of Western democracies, fails to capture the strategic conduct of their counterparts in the Global South. Traditional middle power theory characterizes these states as multilateralist, norm-driven actors that support the liberal international order through peacekeeping, human rights advocacy, and rule-based cooperation (Cooper et al., 1993; Chapnick, 2000; Ingebritsen, 2002). Countries like Canada and Australia exemplify this model, leveraging institutions to amplify their influence while reinforcing hegemonic stability.

However, this model does not travel well. Emerging middle powers such as India, Turkey, Brazil, and Indonesia do not behave as passive norm entrepreneurs or guardians of multilateralism. Instead, they pursue strategic autonomy through transactional diplomacy, selective multilateral engagement, and rhetorical agility. These states do not merely absorb institutional norms, they exploit institutional fragmentation to increase maneuverability and avoid binding commitments. The dichotomy proposed by Jordaan (2003) between “traditional” and “emerging” middle powers was an early recognition of this divide, but it fell short of offering a generalizable theory of how and why such actors pursue ambiguous foreign policy strategies.

This conceptual gap is compounded by the limitations of the hedging literature itself. While the concept of hedging has gained traction, particularly in the context of Southeast Asia’s navigation of U.S.-China rivalry, its analytical development remains incomplete. Hedging is often defined loosely as a mix of engagement and balancing (Goh, 2007; Kuik, 2008), or as a pragmatic alternative to alignment and neutrality. Yet this definitional flexibility risks turning hedging into a residual category, an umbrella term for any behavior that does not fit existing alliance models.

Three major weaknesses limit the current literature on hedging. First, it

is regionally narrow. Most empirical studies focus on Southeast Asia, offering little insight into comparable behavior in Africa, Latin America, or the Middle East. This regional bias limits theoretical generalizability and leaves a blind spot in comparative analysis. Second, the literature lacks causal precision. It often describes what hedging looks like but fails to explain its variation across cases or its durability over time. Third, hedging remains under-theorized. Few studies engage with broader paradigms in international relations or generate testable hypotheses. The result is an empirically rich but conceptually shallow body of work.

Some recent efforts, such as those by Lim and Cooper (2015) and Destradi (2010), have begun to move the discussion toward more systematic categorization and causal analysis. Yet even these contributions fall short of integrating material, institutional, and ideational mechanisms into a unified explanatory framework. The field still lacks a mid-range theory that explains not only the emergence of hedging but also its variation across domains, its strategic logic, and the conditions under which it becomes a sustainable foreign policy choice.

This article addresses these lacunae by developing a comparative theory of strategic hedging tailored to the empirical conditions faced by Global South middle powers. It treats hedging not as indecision or ambiguity, but as a rational response to systemic fragmentation. It draws on a broader range of cases across Asia, Africa, Latin America, and the Middle East, and develops falsifiable hypotheses rooted in material asymmetries, institutional pluralism, and discursive flexibility. In doing so, it bridges gaps in both middle power theory and hedging scholarship, offering a generalizable framework for understanding the foreign policy strategies of states navigating uncertainty in a multipolar, contested international system.

This article advances a mid-range theory of strategic hedging as a deliberate and multidimensional foreign policy strategy employed by middle powers in a fragmented bipolar system. It theorizes that strategic hedging emerges and persists when three enabling conditions co-occur: structural asymmetry, institutional pluralism, and identity elasticity. These conditions provide, respectively, the incentives, arenas, and discursive tools necessary for states to pursue calibrated ambiguity across multiple domains of foreign policy.

Strategic hedging is defined here as a sustained pattern of engagement with rival great powers across at least two key policy domains (security, economics, and institutional affiliation) without fully committing to either side. It differs from neutrality (which implies detachment), balancing (which implies opposition), and bandwagoning (which implies submission). Hedging is neither transitional nor incoherent; it is a strategic response to uncertainty and interdependence under conditions of fragmented polarity.

Unlike previous approaches that treat hedging as tactical or reactive, this framework conceptualizes it as a rational strategy that varies systematically

across states based on identifiable enabling conditions. The dependent variable, hedging behavior, is disaggregated into three analytical dimensions: 1) Domaniial Scope: the number of foreign policy arenas where divergence is sustained; 2) Depth of Divergence: the intensity of engagement with rival poles; 3) Temporal Durability: the persistence of this behavior over time.

Enabling Condition 1: Structural Asymmetry

The first condition, structural asymmetry, refers to a state's dependence on multiple great powers in distinct strategic domains. For example, a country may rely on the U.S. for military protection, China for trade and infrastructure, and Russia for energy or arms. When no single pole dominates all areas of dependence, the state has incentives to avoid exclusive alignment and instead hedge to preserve access to benefits from multiple actors.

This asymmetry generates a strategic dilemma: alignment with one pole risks losing access to critical resources from others. In such cases, hedging becomes a rational mechanism to manage these cross-cutting dependencies and avoid overexposure to any one patron.

Enabling Condition 2: Institutional Pluralism

The second condition, institutional pluralism, captures a state's simultaneous participation in ideologically divergent multilateral arrangements, such as G20 and BRICS, NATO and the Organization of Islamic Cooperation, ASEAN and IPEF. Institutional pluralism expands the set of arenas in which states can compartmentalize engagement, signal ambiguity, and recalibrate alignments.

Rather than viewing institutions as convergence mechanisms that constrain behavior, this framework treats them as enabling infrastructures that facilitate flexibility. Overlapping institutional memberships allow states to send different signals to different audiences, reducing the reputational costs of multidomain divergence. This compartmentalization is especially potent when informal or low-commitment organizations, such as IIGOs, are used to broaden participation without binding obligations.

Enabling Condition 3: Identity Elasticity

The third condition, identity elasticity, refers to the discursive ability of states to construct and perform multiple, sometimes contradictory, foreign policy roles across venues and audiences. Middle powers like Turkey, India, and Indonesia invoke different identities, such as democratic partner, civilizational actor, or Global South leader, depending on the context. These identity performances allow states to justify divergent behavior while preserving reputational coherence.

Building on critical constructivist insights (Pouliot, 2010; Cornut & Pouliot, 2015), this study treats identity not as a stable, path-dependent constraint but as a performative resource. Identity elasticity is what allows states to transform apparent contradictions into legitimate flexibility, shielding them from domestic and international backlash when they diverge from expected roles.

Results

This section presents the empirical findings from a structured-focused comparison of ten middle powers: India, Turkey, Saudi Arabia, Indonesia, Brazil, South Africa, Nigeria, Argentina, Thailand, and Mexico. Three core hypotheses were tested to evaluate the influence of structural asymmetry, institutional pluralism, and identity elasticity on the depth, scope, and durability of strategic hedging behavior investment, or Saudi Arabia’s oil alignment with China and military ties to the U.S.

Structural Asymmetry and Depth of Divergence

Hypothesis 1: Middle powers are more likely to pursue deep strategic hedging when they are structurally asymmetric, i.e., when their material dependencies are distributed across rival great powers in distinct issue areas.

Structural asymmetry was coded based on divergence across three domains:

1. Top arms suppliers (U.S., Russia, China)
2. Major trade and FDI partners
3. Technological or energy dependencies (e.g., Huawei 5G, oil trade, infrastructure)

The dependent variable – depth of divergence – measures the intensity of engagement with competing powers. A high score reflects simultaneous entanglement with rival poles, such as India’s reliance on Russian arms and U.S. investment.

Table 2. Structural Asymmetry and Depth of Divergence

Country	Struct. Asymmetry	Depth of Divergence	Key Asymmetric Dependencies
India	2 (High)	2 (High)	Russian arms, U.S. investment, Iran energy
Türkiye	2 (High)	2 (High)	NATO + S-400 (Russia), China trade, Western FDI
Saudi Arabia	2 (High)	2 (High)	Oil exports to China, U.S. military protection
Indonesia	2 (High)	1 (Moderate)	Chinese infrastructure, U.S. arms
Nigeria	1 (Moderate)	1 (Moderate)	China FDI, mixed U.S. and China military ties
South Africa	1 (Moderate)	1 (Moderate)	China trade, BRICS institutional links
Brazil	1 (Moderate)	1 (Moderate)	China trade, minor U.S. security ties
Thailand	1 (Moderate)	1 (Moderate)	U.S. treaty ally, China trade, Huawei
Argentina	1 (Moderate)	1 (Moderate)	Chinese infrastructure, limited defense ties
Mexico	0 (Low)	0 (Low)	U.S. dependence across security, trade, and institutions

Institutional Pluralism and Domanial Scope

Hypothesis 2: Middle powers are more likely to engage in broad-spectrum hedging, spanning multiple foreign policy domains, when they are embedded

in ideologically diverse institutional environments, including both formal IGOs and informal IIGOs.

Institutional pluralism was measured by:

1. Dual membership in formal organizations (e.g., BRICS, SCO, G20, IPEF)
2. Participation in informal IGOs (e.g., MIKTA, IBSA, NAM, OIC, D-8, CELAC)

Domainal scope was coded by identifying the number of foreign policy domains (security, economics, institutions) in which a state maintains divergent alignments.

Table 3. Institutional Pluralism and Domainal Scope

Country	U.S.-led IGOs	China-led IGOs	Southern/ Non-Aligned IGOs	Hybrid / Bridge Forums	Inst. Pluralism	Domainal Scope	Key Forums Used for Hedging
India	Quad, IPEF	SCO	NAM, IBSA	BRICS, G20	High (2)	High (2)	BRICS, Quad, SCO, NAM
Türkiye	NATO, MIKTA	None	D-8, OIC	G20	High (2)	High (2)	NATO, G20, OIC, D-8
Brazil	IPEF (observer)	None	CELAC, IBSA	BRICS, G20	High (2)	High (2)	BRICS, G20, CELAC
South Africa	None	None	IBSA, NAM	BRICS, G20	High (2)	High (2)	BRICS, IBSA, NAM
Indonesia	IPEF	None	D-8, NAM, ASEAN+	G20	High (2)	High (2)	G20, ASEAN+, NAM
Saudi Arabia	IPEF (exploratory), G20	BRICS (2024)	OIC, D-8	—	High (2)	Moderate (1)	G20, BRICS, OIC
Thailand	APEC, IPEF	None	ACD, ASEAN+	—	Moderate (1)	Moderate (1)	ASEAN+, APEC
Nigeria	—	—	NAM, OIC, D-8	AU	Moderate (1)	Moderate (1)	NAM, OIC
Argentina	G20	BRICS (2023 application)	CELAC	—	Moderate (1)	Low (0)	G20, CELAC
Mexico	OECD, IPEF (observer), G20	None	MIKTA	—	Low (0)	Low (0)	G20 only

Identity Elasticity and Temporal Durability

Hypothesis 3: Middle powers are more likely to sustain strategic hedging over time when they possess high identity elasticity, that is, the rhetorical and ideological flexibility to perform divergent foreign policy roles across different audiences and institutional settings.

Identity elasticity was coded based on:

1. Discursive framing in multilateral forums (e.g., UN, BRICS, NAM, G20)
2. Public justification of abstention or dual alignment
3. Use of post-colonial, religious, democratic, or sovereignty-based narratives

Temporal durability was measured by continuity in hedging behavior, especially voting patterns on key UN resolutions related to the Russia–Ukraine war (2022–2023).

Table 4. Identity Elasticity and Hedging Durability

Country	Identity Elasticity	Temporal Durability	Identity Frames Used
India	2 (High)	2 (High)	Civilizational, democratic, post-colonial, sovereignty
Türkiye	2 (High)	2 (High)	Neo-Ottomanism, Islamic, anti-Western populist
Saudi Arabia	2 (High)	2 (High)	Islamic conservatism, Vision 2030 pragmatism
Brazil	1 (Moderate)	1 (Moderate)	Global South solidarity, democratic variability
Indonesia	1 (Moderate)	2 (High)	Islamic pluralism, Global South, neutrality rhetoric
South Africa	1 (Moderate)	1 (Moderate)	Anti-colonial, Global South, ANC liberation legacy
Nigeria	1 (Moderate)	1 (Moderate)	Pan-African, religious, democratic
Argentina	1 (Moderate)	1 (Moderate)	Peronist Third Way, post-colonial
Thailand	0 (Low)	1 (Moderate)	Technocratic, non-ideological
Mexico	0 (Low)	0 (Low)	Regionally bound, U.S.-oriented, fixed democratic identity

Table 5. Middle Powers’ Positions on the War in Ukraine

Country	UN ES-11/1	UN ES-11/2	UN ES-11/3	UN ES-11/4	UN ES-11/5	UN ES-11/6	Sanctions on Russia (2022)	Military Assistance to Ukraine
India	Abstained	Abstained	Abstained	Abstained	Abstained	Abstained	No	No
South Africa	Abstained	Abstained	Abstained	Abstained	Abstained	Abstained	No	No
Thailand	In Favor	In Favor	Abstained	Abstained	Abstained	In Favor	No	No
Brazil	In Favor	In Favor	Abstained	In Favor	In Favor	In Favor	No	No
Indonesia	In Favor	In Favor	Abstained	In Favor	Abstained	In Favor	No	No
Nigeria	In Favor	In Favor	Abstained	In Favor	Abstained	In Favor	No	No

Country	UN ES-11/1	UN ES-11/2	UN ES-11/3	UN ES-11/4	UN ES-11/5	UN ES-11/6	Sanctions on Russia (2022)	Military Assistance to Ukraine
Saudi Arabia	In Favor	In Favor	Abstained	In Favor	Abstained	In Favor	No	No
Mexico	In Favor	In Favor	Abstained	In Favor	In Favor	In Favor	No	No
Argentina	In Favor	No	Yes					
Türkiye	In Favor	No	Yes					

Table 6. Cross-Case Comparison of Causal Mechanisms and Outcomes

Country	Struct. Asymmetry	Inst. Pluralism	Identity Elasticity	Hedging Intensity	Typology
India	2 (High)	2 (High)	2 (High)	High	High-Intensity
Türkiye	2 (High)	2 (High)	2 (High)	High	High-Intensity
Saudi Arabia	2 (High)	2 (High)	2 (High)	High	High-Intensity
Indonesia	2 (High)	2 (High)	1 (Moderate)	High	Doctrinal
Brazil	1 (Moderate)	2 (High)	1 (Moderate)	Moderate–High	Doctrinal
South Africa	1 (Moderate)	2 (High)	1 (Moderate)	Moderate	Doctrinal
Nigeria	1 (Moderate)	1 (Moderate)	1 (Moderate)	Moderate	Doctrinal
Argentina	1 (Moderate)	1 (Moderate)	1 (Moderate)	Moderate	Tactical
Thailand	1 (Moderate)	1 (Moderate)	0 (Low)	Moderate	Tactical
Mexico	0 (Low)	0 (Low)	0 (Low)	Low	Non-Hedger

Discussion

The empirical findings presented above confirm the theoretical expectations developed in this study. The variation in hedging behavior across the ten Global South middle powers—its depth, scope, and durability—can be causally linked to the presence or absence of three enabling conditions: structural asymmetry, institutional pluralism, and identity elasticity. These mechanisms are not only individually powerful but mutually reinforcing. When they align, they enable states to pursue a coherent and sustained strategy of calibrated ambiguity in the face of systemic fragmentation.

Structural Incentives and Deep Divergence

The findings offer strong confirmation of Hypothesis 1. States with cross-cutting strategic dependencies, those dependent on rival great powers across different domains such as arms, trade, infrastructure, and energy, exhibit the deepest forms of hedging. India, Turkey, and Saudi Arabia, the top scorers on both structural asymmetry and depth of divergence, maintain high-stakes engagements with the U.S., China, and Russia across military, economic, and institutional arenas. These states hedge not in spite of material entanglement,

but because of it. Structural exposure becomes a source of strategic leverage, allowing them to avoid full alignment and extract benefits from multiple poles.

Where dependencies are concentrated, most clearly in Mexico, divergence is sharply constrained. Mexico's structural exposure is overwhelmingly oriented toward the United States across security, economic, and institutional dimensions, producing a foreign policy of exclusive alignment and effectively precluding a hedging strategy. This contrast illustrates the enabling, not merely constraining, role of asymmetric interdependence in foreign policy maneuvering.

Institutional Pluralism and Multidomain Scope

Hypothesis 2 is supported by the data. States that participate in ideologically divergent institutional arrangements, including both formal IGOs and informal IIGOs, are significantly more likely to hedge across multiple domains. India, Turkey, Brazil, South Africa, and Indonesia all maintain memberships in Western-led, counter-hegemonic, and Global South forums, including BRICS, G20, Quad, NAM, SCO, and IBSA. These institutional linkages enable compartmentalization—economic engagement with one bloc, security cooperation with another, normative alignment with a third.

Importantly, institutional pluralism is not limited to formal treaty organizations. Informal IGOs (IIGOs), such as MIKTA, D-8, ASEAN+, and IBSA, play a particularly critical role. These forums allow states to maintain ambiguous alignments and engage multiple partners without incurring binding commitments or reputational costs. Indonesia, for instance, simultaneously participates in D-8, NAM, ASEAN+, and IPEF, enabling it to signal alignment flexibility across regional and global venues.

The comparative absence of institutional pluralism corresponds with a narrow scope. Mexico, again, stands out as a negative case. Its institutional environment is dominated by U.S.-led organizations, G20, OECD, MIKTA, with minimal participation in counter-hegemonic or Global South groupings. This institutional exclusivity limits its ability to compartmentalize engagement or diversify partnerships, contributing to its status as a non-hedger.

Identity Elasticity and Temporal Durability

The third hypothesis, concerning identity elasticity and hedging durability, is also confirmed. The three states that scored highest on identity elasticity, India, Turkey, and Saudi Arabia, also maintained the most sustained hedging strategies over the 2010–2023 period. These countries consistently performed multiple diplomatic identities across institutional and normative contexts: India invokes democratic solidarity in the Quad, civilizational discourse in BRICS, and sovereignty narratives at the UN; Turkey oscillates between NATO partner, Islamic leader, and Eurasian actor; Saudi Arabia combines Islamic conservatism with Vision 2030 modernization rhetoric.

Identity elasticity allows these states to reconcile contradictory alignments and justify strategic ambiguity across diverse audiences. It functions as a

discursive mechanism that sustains hedging by insulating states from domestic and international backlash. The UN General Assembly voting record on the Russia–Ukraine war reinforces this pattern: India and South Africa abstained on all major resolutions, while Turkey and Argentina voted in favor of each, confirming the role of rhetorical flexibility in enabling durable non-alignment.

States with limited identity elasticity, such as Mexico and Thailand, exhibit predictable alignment behavior. Their diplomatic narratives, liberal democratic for Mexico, technocratic and non-ideological for Thailand, lack the flexibility to justify sustained ambiguity. Consequently, they either align with one bloc or adopt weak, episodic forms of hedging.

Synthesis and Strategic Typology

The cross-case comparison in Table 6 confirms the meta-hypothesis: when structural asymmetry, institutional pluralism, and identity elasticity co-occur, states are most likely to engage in high-intensity strategic hedging. India, Turkey, and Saudi Arabia exemplify this ideal type, combining deep material entanglement, broad institutional participation, and high discursive flexibility to construct coherent and sustainable hedging strategies. Their divergence is not tactical or ad hoc, but systematic and durable.

The typology derived from this synthesis classifies middle powers into four categories:

1. High-Intensity Hedgers (India, Turkey, Saudi Arabia): Fulfill all three enabling conditions and pursue deep, broad, and sustained divergence. Hedging is doctrinal and proactive.
2. Doctrinal Hedgers (Indonesia, Brazil, South Africa, Nigeria): Fulfill two conditions and hedge consistently across selected domains, but with less comprehensiveness.
3. Tactical Hedgers (Argentina, Thailand): Fulfill one or two conditions but hedge reactively or inconsistently, often due to elite turnover or crisis response.
4. Non-Hedger (Mexico): Lacks enabling conditions and maintains exclusive alignment.

This typology not only captures variation in intensity but also strategic logic. High-intensity and doctrinal hedgers treat ambiguity as a core element of their foreign policy doctrine. Tactical hedgers hedge episodically and often incoherently. Non-hedgers align structurally, institutionally, and rhetorically with a dominant pole.

Explaining Deviant and Borderline Cases

Some cases deviate from expectations or sit near category boundaries. Argentina, while exhibiting some economic asymmetry and institutional pluralism, fails to sustain strategic ambiguity due to elite-driven foreign policy volatility. Its hedging is inconsistent and vulnerable to political turnover. Indonesia, despite moderate identity elasticity, demonstrates high hedging durability, likely a reflection of its layered institutional affiliations and non-

confrontational diplomatic style.

Saudi Arabia, traditionally viewed as a U.S. client state, now exhibits all three enabling conditions. Its entry into BRICS, expanded ties with China, and calibrated distancing from Washington signal a shift toward high-intensity hedging. The case illustrates how identity performance, through Vision 2030, Islamic legitimacy, and selective sovereignty narratives, can transform an alignment-dependent state into a hedger.

The findings of this study refine and challenge dominant paradigms in International Relations. Realism's binary assumptions about balancing and bandwagoning are inadequate to explain sustained engagement with rival powers. Liberal institutionalism overstates the constraining effects of multilateralism and underestimates the strategic utility of institutional pluralism. Mainstream constructivism, focused on identity coherence, often fails to recognize the deliberate and performative nature of diplomatic role-switching.

Instead, this study offers a synthetic framework, one that integrates material incentives, institutional structures, and discursive practices, to explain how middle powers navigate a fragmented and contested international system. Strategic hedging emerges not as residual behavior, but as a coherent and rational response to multipolarity, regime complexity, and normative ambiguity.

Conclusion

This study has reconceptualized strategic hedging as a rational, multidimensional, and sustainable foreign policy strategy pursued by middle powers navigating a fragmented bipolar order. Contrary to prevailing theories that frame hedging as indecision, opportunism, or tactical ambiguity, this research demonstrates that hedging can be systematically explained as the outcome of three enabling conditions: structural asymmetry, institutional pluralism, and identity elasticity. When these conditions align, states do not merely react to systemic pressure, they actively shape their strategic environment through calibrated engagement across rival poles.

Using a structured-focused comparison of ten analytically selected middle powers, this study tests three core hypotheses and one meta-hypothesis. It finds strong empirical support for the claim that variation in hedging behavior, its scope, depth, and durability, can be predicted by variation in material dependencies, institutional entanglements, and rhetorical flexibility. The analysis reveals that high-intensity hedgers (e.g., India, Turkey, Saudi Arabia) consistently diverge across domains and sustain that behavior through strategic use of institutions and identity narratives. In contrast, tactical hedgers (e.g., Argentina, Thailand) and non-hedgers (e.g., Mexico) lack the structural and discursive resources to pursue such calibrated ambiguity.

Theoretically, this study bridges gaps across realism, institutionalism, and constructivism by synthesizing material, institutional, and ideational mechanisms into a unified framework. It corrects the blind spots of each tradition:

realism's binary determinism, liberalism's over-socialization of institutions, and constructivism's under-theorized discursive plasticity. In doing so, it contributes a mid-range theory that is generalizable across regions, falsifiable across cases, and operationally precise.

Empirically, this study expands the geography of hedging beyond Southeast Asia to encompass the Global South, capturing the strategic logic of states in Latin America, Africa, and the Middle East. The use of cross-national indicators, original coding schemes, and harmonized data from 1) UN Voting Behavior on the Russia–Ukraine War; 2) Economic Alignment Data: Trade and Investment Exposure; 3) Security and Technology Cooperation, and the IIGO dataset ensures comparability and analytical rigor. By moving beyond regionally bounded typologies and into systematic causal inference, the study offers a replicable model for future research.

Conceptually, it reframes middle powers not as passive norm followers or bridge-builders but as autonomous actors capable of sequencing identities, managing institutional complexity, and manipulating systemic ambiguity to advance their interests. Strategic hedging, as theorized here, is not an exception to the international order: it is a core strategy of maneuver within it.

This research also carries implications for both scholars and policymakers. For scholars, it offers a testable framework that invites further exploration of how emerging powers navigate fragmented orders and institutional overlap. For policymakers, it highlights that strategic ambiguity is not indecision to be punished, but agency to be understood. Misreading hedging as defiance risks undermining relationships with pivotal states whose behavior is structurally conditioned and rationally constructed.

As great power competition intensifies and regime complexity deepens, strategic hedging will likely become more, not less, central to global politics. Future research should explore the feedback loops between hedging and systemic change, examine variation within middle power coalitions, and investigate how digital diplomacy, elite turnover, or economic shocks affect the durability of hedging strategies. This study provides a theoretical foundation for those inquiries, and a conceptual roadmap for understanding the strategic logic of calibrated ambiguity in the twenty-first century.

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ФРАГМЕНТТЕЛГЕН БИПОЛЯРЛЫҚ ТӘРТІП ЖАҒДАЙЫНДА ОРТА ДЕРЖАВАЛАРДЫ СТРАТЕГИЯЛЫҚ ТЕЖЕЛЕНУІ

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Аңдатпа. Бұл мақала Орта Державалардың фрагменттелген биполярлы жүйеде қолданатын стратегиялық шарбақтану саясатын рационалды, көпқырлы және орнықты сыртқы саясат стратегиясы ретінде

қайта қарастырады. Зерттеу құрылымдалған салыстырмалы талдау әдісімен Үндістан, Түркия, Индонезия, Бразилия, Оңтүстік Африка, Мексика, Аргентина, Нигерия, Сауд Арабиясы және Таиланд секілді он жаһандық оңтүстік елдерін зерттейді. Зерттеуде үш фактордың әсері бағаланады: құрылымдық асимметрия, институционалдық плюрализм және өздік икемділік. Нәтижелер көрсеткендей, орта державалар экономикалық, қауіпсіздік және институционалдық салаларда стратегиялық маневр жасау үшін өзара тәуелділікті, институттық әртүрлілікті және риторикалық бейімделуді тиімді қолданады. Мақала материалдық, институционалдық және идеялық механизмдерді біріктіретін орта деңгейлі теория ұсынады.

Тірек сөздер: стратегиялық тежелену, орта державалар, мультиполярлық жүйе, институционалдық плюрализм, тұлғалық икемділік, жаһандық оңтүстік, сыртқы саясат, стратегия

СТРАТЕГИЧЕСКОЕ СДЕРЖИВАНИЕ СРЕДНИХ ДЕРЖАВ В УСЛОВИЯХ ФРАГМЕНТИРОВАННОГО БИПОЛЯРНОГО ПОРЯДКА

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Аннотация. В статье предлагается новое понимание стратегического хеджирования как рациональной, многомерной и устойчивой стратегии внешней политики, используемой государствами средней мощности в условиях фрагментированного биполярного порядка. С применением структурированного сравнительного анализа исследуются десять стран Глобального Юга – Индия, Турция, Индонезия, Бразилия, Южная Африка, Мексика, Аргентина, Нигерия, Саудовская Аравия и Таиланд – для оценки влияния трех ключевых факторов: структурной асимметрии, институционального плюрализма и эластичности идентичности. Результаты показывают, что государства средней мощности осознанно используют асимметричные зависимости, участие в различных институтах и гибкость идентичности для хеджирования в экономической, военной и институциональной сферах. Исследование предлагает среднеуровневую теорию, объединяющую материальные, институциональные и идеологические механизмы объяснения вариативности стратегий сдерживания.

Ключевые слова: стратегическое сдерживание, государства средней мощности, мультиполярность, институциональный плюрализм, эластичность идентичности, Глобальный Юг, внешняя политика, стратегия

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Received: May 9, 2025