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What Influence in a Multipolar World?**

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Which countries are middle powers and are they poised to be more relevant in an evolving multipolar world or will they be weaker in it?

In the context of rapid global change—including shifting geopolitics, rapid technological diffusion and global warming—this article examines potential roles for middle powers. It asserts that the world is now firmly multipolar in its dynamics, although the shape of a new global order remains in flux.

The current unsettled global order creates tensions between the existing neoliberal institutions that have dominated since 1945 and a parallel patchwork of new and nascent arrangements promoted by emerging economies, often led by China. The Breton Woods economic institutions—the International Monetary Fund (IMF), the World Bank Group (WBG) and the World Trade Organization (WTO) continued to have some impact, but they also reveal huge gaps between their original mandates and governance structures on the one hand, and, on the other, the reality of their altered member countries and the contemporary issues beyond their reach. It is simply a fact that the governance of these dated institutions do not reflect the changed size and composition of their members, and they are incapable of substantively addressing new risks that stem from issues such as climate change and artificial intelligence. Therefore, under this current state of affairs, no overall framework or institutional structure exists for effectively managing global issues, and there is no consensus on the international norms to be used to design alternatives.

The unsettled global order could remain an unstructured patchwork, or it could dramatically change. Given a wide range of possible futures, this article will consider different scenarios in which middle powers might, or might not, have significant roles in the global order.

To start, it is helpful to define what middle powers are, and to assess whether those definitions still apply today. There is no universally agreed upon definition of “middle power.” However, the basic concept implies that middle powers are modestly powerful states (but not superpowers, great powers or small powers) that seek to have influence outside their borders.

In some form, middle powers have been around since the earliest nations faced each other in political, economic, religious, military and cultural competition. History is full of examples of such a role. As a city-state, ancient Carthage managed to exert significant power and influence in the Mediterranean and surrounding areas during a period that was dominated by great powers like Rome and Persia (Miles, 2011). Similarly, during the Goryeo period (918 – 1392 CE), Korea had significant regional influence while neighbouring the much more powerful Song Dynasty in China (Seth, 2010).

Various middle power roles, waxing and waning, continued throughout history. However, with the rise of more formalized state sovereignty (e.g., the Peace of Westphalia in 1648) the international recognition of a state’s exclusive sovereignty over its territory grew, initially in Europe. This allowed for the growth of middle powers within the system and paved the way for a more formal ranking of different sized states through diplomacy. An example of this new model was evident at the Congress of Vienna (1814-15), where the most powerful states mapped out the future of Europe but also included the participation of middle powers of the time such as Sweden (Holbraad, 1971).

After 1945, non-great powers like Canada, Australia, Norway and others sought to find a more prominent role for themselves in the post-war international system and to distinguish themselves from smaller powers (Laurence, 2023, p.1). As a leading example, in the aftermath of the war, Canadian leaders Louis St Laurent, Lester B Pearson and others saw opportunity for their country as a middle power, especially within the new multilateral system. These ideas gained enough traction to influence, for example, the creation of the United Nations Security Council, with its five permanent members and the rotation of ten additional non-permanent members. This created a role of institutionalized middle power influence in the UN system and in other institutions. Canada and other middle powers like Sweden were particularly active (e.g., UN peacekeeping) in the 1950s to the 1980s, but the end of the Cold War changed the geopolitical dynamics to the point where middle powers needed to reinvent their approaches (Cooper, Higgot, & Nossal, 1993). As this article will explore, the evolving post-Cold War landscape has seen the rise of a new group of potential middle power countries in the emerging economies, which has significantly altered the dynamics and expanded potential roles.

History demonstrates that the role for middle powers is context specific. There needs to be an international architecture that allows for (or at least tolerates) middle power activity and influence. There are no guarantees for such a permissive or encouraging architecture to exist. For example, for the most part, the United States was quite pleased to have Canada and other countries like Australia carry out middle power roles during the Cold War as additional leverage for its own objectives and contributed to maintaining the international power structure.

What does the analysis of the past mean for the present as we approach 2025? By some measures, there are as many as fifty countries that could potentially be middle powers. Two core criteria would appear to be essential requirements to be a middle power:

- Possessing enough power or heft in military or economic terms; and
- Taking action to develop a role in international engagement and influence.

Other criteria, including geography, demographics and historical roles are also important, but are likely to be secondary in relevance. Examining who is and who is not a middle power in current multipolar context also raises questions about which countries are great powers since so much has changed since the creation of the United Nations in 1945. Since that time, population growth has massively shifted to developing nations, as has, more recently, the strongest annual economic growth. In addition, many developing economies have increased military spending and are seeking out more proactive international roles in their regions and beyond.

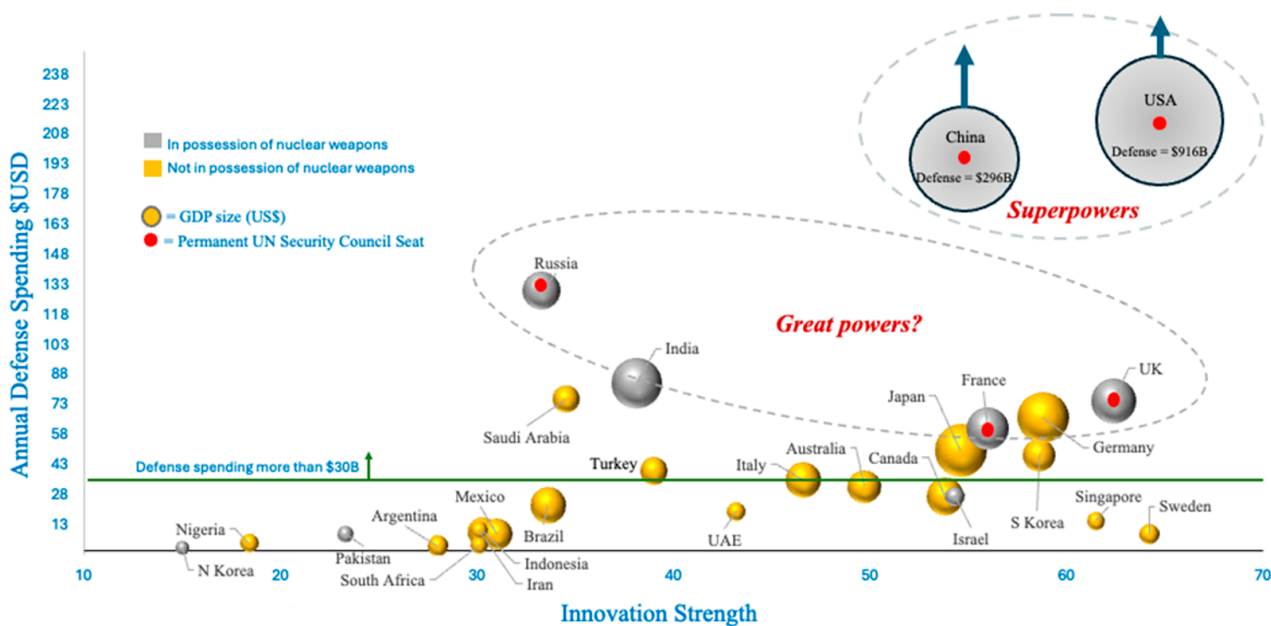
Chart 1 below outlines some quantitative measures to help define which countries are, or have potential to be, middle powers. This chart is not intended to be comprehensive and looks at a limited, but revealing, set of elements:

1. Current total annual defense spending compared in US dollars (SIPRI, 2024);
2. Current Gross Domestic Product (GDP) compared using market exchange rates in US dollars (IMF, 2024);
3. A measure of innovation (as a proxy for technological capacity and potential), based on the World Intellectual Property Organization's Global Innovation Index (WIPO, 2023);
4. Whether or not a country possesses nuclear weapons; and
5. Status, or not, as a permanent member of the UN Security Council, which reflects the history of 1945 as well as soft power.

While these are the core criteria used below, a number of other potentially relevant ones were not added. These include, but are not limited to: population size, geography, and a range of "soft power" measures such as the level of diplomatic activity, development assistance support, multilateral engagement, alliances, and historical or traditional roles.

Quantitative analysis leaves many things out. The data visualization here includes the G20 countries and a few others. Many sizable powers like Egypt, Vietnam, Taiwan, the Philippines and Ukraine could also have been included. The inclusion of "innovation" (shown on the x axis) could be replaced by another relevant measure like regional or diplomatic activity, although it would not significantly shift the results.

Chart 1. How to define a middle power?



Data sources: SIPRI Military Expenditure Database (2024)
 WIPO Global Innovation Index (2023) and CIGI calculations
 IMF World Economic Outlook Database (2024)

A few key observations in Chart 1 are worth noting here. The two superpowers, the United States of America (USA) and China, stand alone in economic size (the size of the bubble); in the total size of their military spending (y axis); they are both nuclear powers and permanent members of the UN Security Council; and they are both leaders in technology and innovation (x axis). In stark contrast, trying to quantitatively identify a set or range of “great powers” is much less convincing. For example, the Russian economy is not very large, is struggling on innovation and technology, and is in significant demographic decline. That said, the number and range of nuclear weapons in Russia’s possession alone would seem to make it a *de facto* great power. Moreover, with larger economies, are Japan and Germany middle powers in comparison to the UK and France? Is it because the latter have nuclear weapons and a permanent seat on the UN Security Council that they are great powers? Is it due to their ties with past colonies? Given it is now the world’s most populous nation (1.45 billion in 2024), has significant economic growth projected and new international ambitions, India is quickly becoming a great power if it is not there already.

If annual defense spending of more than \$30B is a significant comparative baseline for international heft as the analysis would seem to suggest, rising military budgets for Turkey, Saudi Arabia, Australia, Japan and South Korea are noteworthy, as will be future defense budgeting decisions for lagging countries like Canada and Argentina. Economies like Singapore and UAE are clearly punching above their weight, given their relatively small size. There are nine countries, all listed in Chart 1, that possess nuclear weapons. Among them, Israel, Pakistan and North Korea stand out as smaller economies with large armed forces and nuclear weapons. The

fact that size does not dictate who and who does not have nuclear weapons obviously has huge implications for power dynamics.

Analytical perfection to build a precise definition or ranking of a country's relative power is elusive. But frameworks for general groupings can provide strategic insight. Australia's Lowy Institute uses 133 indicators in the *Asia Power Index* to calculate eight thematic measures: military capability and defence networks, economic capability and relationships, diplomatic and cultural influence, and resilience and future resources (Lowy Institute, 2024). This index plots the distribution of power and ranks 27 countries in the Asia-Pacific into four categories of: superpower, major power, middle power and minor power. Interestingly, the Lowy index identifies two superpowers in the region (USA and China) but zero major powers. India and Japan are closest to the "major power" category and sit atop a large group of 18 middle powers, which includes South Korea, Australia, Russia, Singapore, Indonesia, Malaysia, the Philippines, New Zealand, Pakistan, North Korea, Taiwan and Thailand.

Investor and author Ray Dalio has published *The Great Powers Index* for 24 leading countries, including their prospects over the coming decade. The first component of his Index is the "levels of strength" as measured by indicators including GDP, share of world trade, education levels and military strength (Dalio, 2024, p. 2). The USA ranks first overall on strength, followed by China, the Eurozone, Germany, Japan, Korea, India, UK, France, Russia, Singapore, Australia, Turkey, Canada, Switzerland, Brazil, Netherlands, Indonesia, Italy, Spain, Saudi Arabia, Mexico, South Africa and Argentina. Looking out over the next decade, this Index predicts a declining trend in the USA, Eurozone and Japan, and a positive trend in China, India, Turkey and Indonesia. It is interesting in the rankings once again how much of a gap there is between the two superpowers and all the rest in defining power capability. In addition, the fact that a city-state like Singapore could rank 10th overall (and 1st overall per capita) and Switzerland 14th overall underlines the relevance of focus and quality. It is also striking that in this Index, Japan, Korea and India outrank the traditional great powers of the UK, France and Russia.

Key conclusions from the analysis above are as follows:

- Evidence supports that there are two preeminent superpowers;
- There may be a few great powers, but this is contested by different measures;
- There are a large number of middle powers, and by different measures this could potentially include more than 50 countries;
- Relative to the whole, a number of mostly emerging economies are rising as new middle powers.
- There remains a large technology and innovation gap between the richest countries and the rest.
- The possession of nuclear weapons creates significant power asymmetries and risks, including cases where smaller nations possess them.

In an evolving multipolar world, different global order scenarios will bring different opportunities and challenges for middle powers. In the current context, demographic, economic, environmental, technological, political, military and social factors of change are pervasive on a global scale. While there are some signs of continuity (under most scenarios the USA remains the world's largest economy), scenarios out to 2040 show huge pressures building in the international system that will likely drive deep change (Samson, Sargent, Zivkovic, Forrest & Momani, 2024). In addition, uncertainty is pervasive and global shocks to the international system must be expected.

All countries are confronting unprecedented demographic challenges on the horizon. In the G20 it is due to declining birth rates, and in much of Africa it is the challenge of a coming youth bulge. Global debt has reached unprecedented levels in the vast majority of countries and new paths for growth are increasingly elusive. Climate change impacts are present and growing, and many global ecosystems are at risk. Rapidly developing technologies such as artificial intelligence (AI), nuclear fusion and quantum computing are wild cards — they are ushering in both tremendous promise and significant peril. Democracies and authoritarian regimes are in conflict, including several regional conflicts, and proxy wars are dividing the largest powers. Many socio-economic inequalities persist or are worsening, driving high levels of social tension and unrest in many countries. There is mounting pressure from migration activity driven by political, economic, social, environmental challenges around the world. The multilateral system that was designed to sustain a stable global order is not able to keep up. These shortcomings were laid bare during the Great Financial Crisis of 2008/09. Officials at multilateral institutions themselves have regularly noted that the old system was no longer able to function. Several leading thinkers in the IMF noted in 2018 that:

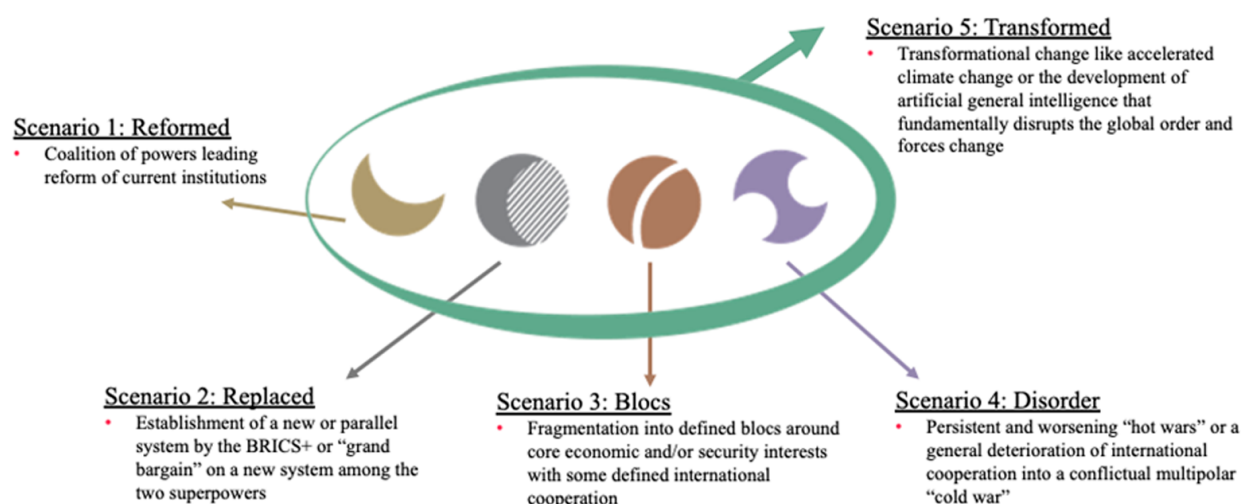
The heady postwar days—when countries formally surrendered elements of their sovereignty, including exchange rate sovereignty—are behind us... cooperation will rely on “soft” law, where countries collectively agree to apply best practices, such as the Basel Core Principles governing bank regulation, rather than “hard” law or legally binding treaty obligations (Gaspar, Hagan, & Obstfeld, 2018, p. 2).

While the forces for change may be evident, the trajectory of new global order remains highly uncertain. The global order is under strain, propelled by the complex interplay of global trends and their impacts. Converging factors are redefining the contours of the international system, necessitating significant adaptation by states. Challenges and opportunities will have large implications for international power dynamics, including for middle powers.

In this context, it is useful to map out several scenarios for global order that could unfold. This section outlines five scenarios (Figure 1) that represent a spectrum from modest plausible change (reform of the current system) to radical change (transformation of the whole system). Each scenario has multiple potential pathways, they are not mutually exclusive, and more than one could likely evolve in conjunction. These five scenarios (Samson, Kalash, Zivkovic, Forrest, & Bessma

Momani, 2024) are intended to frame the scope of potential change but are not intended to be inherently pessimistic or optimistic. There is potential for economic gains or improvements to inequality, for example, under any scenario, just as there is potential for things to get worse.

Figure 1. Five Scenarios for Global Order



Source: Adopted from CIGI 2024b

What are some of the potential implications for middle powers under different scenarios?

Under the first scenario, key international institutions are “reformed” (Samson, Kalash, Zivkovic, Forrest, & Bessma Momani, 2024, p.7) and give new life to the foundations of the current structure of global order. Reform would be a tall order given that major changes would be required to get institutions on track to manage key global challenges such as wars in Ukraine and Lebanon, trade rules for digital goods and AI, climate change financing, pandemic vulnerabilities and food insecurity. One can imagine a pathway whereby the largest powers are not concerned with a continued erosion of multilateralism, particularly in international trade and investment, or neglect and even undermine the current system. Could this create an imperative or call to action, for medium-sized economies which are more reliant on multilateral or plurilateral cooperation to secure a stable and predictable system to support their interests? Could a weakening position prompt the formation of a coalition of frustrated middle powers to unit around a shared commitment to an open, rules-based international order due to an existential fear of its demise and the impact on their quality of life? Such a coalition could potentially encompass the G6 (minus the US) members and a broader group of states from the Organisation for Economic Co-operation and Development (OECD), which represents more than 30 middle powers, and a few non-OECD developing economies. Given the complexities inherent in achieving consensus on security-related reforms, the coalition’s focus could be narrower and converge on reforming economic institutions. From a practical perspective, it would make sense to focus on economic reforms.

There is no doubt that a critical variable in the success of such a middle power coalition would be the stance of the United States and China in any new directions. It seems unlikely that they would stand on the sidelines and only observe a group of middle powers disrupting the status quo of existing international economic institutions like the IMF, WBG and the WTO. To have a chance to win, a coalition of middle powers would need to include many developing economies. The package would need to be a comprehensive enough reform agenda, addressing issues such as voting power disparities within the IMF and discriminatory trade practices within the WTO, and perhaps also updating the mandates of specialized agencies such as the International Telecommunication Union (ITU) and the World Intellectual Property Organization (WIPO), as well as potentially for new organizations responsible for climate change, digital governance and migration. However, in the final analysis, it appears very unlikely that middle powers could successfully lead substantive reform of even the Bretton Woods institutions, let alone the entire system, including the United Nations.

Under a second scenario where the current international system is “replaced” (Samson, Kalash, Zivkovic, Forrest, & Bessma Momani, 2024, p. 11) by something new or an attractive alternative appears, middle powers could have various potential roles. One pathway would be where new structures are put in place by the BRICS+¹. For example, the BRICS+ are very focused on setting up a new global payment system to settle international trade as an alternative to the current Society for Worldwide Interbank Financial Telecommunication (SWIFT) system that is dominated by the US dollar and readily subjected to sanctions. A new global payment system could be attractive to many middle power emerging economies who seek to be less reliant on the US dollar, and broad adoption would have significant impact. At the October 2024 BRICS Summit meeting in Russia a new payment system or pilot may be launched. If such a new system were put in place and scaled up, middle powers from advanced economies would need to decide if they were open to using it in some cases for international trade and position themselves in an evolving system.

Another potential pathway in this “replaced” scenario would be for the USA and China to strike some form of “grand bargain” between themselves, perhaps focused on an arrangement that defined regional security zones of primacy and some basic economic rules around monetary policy and international trade.

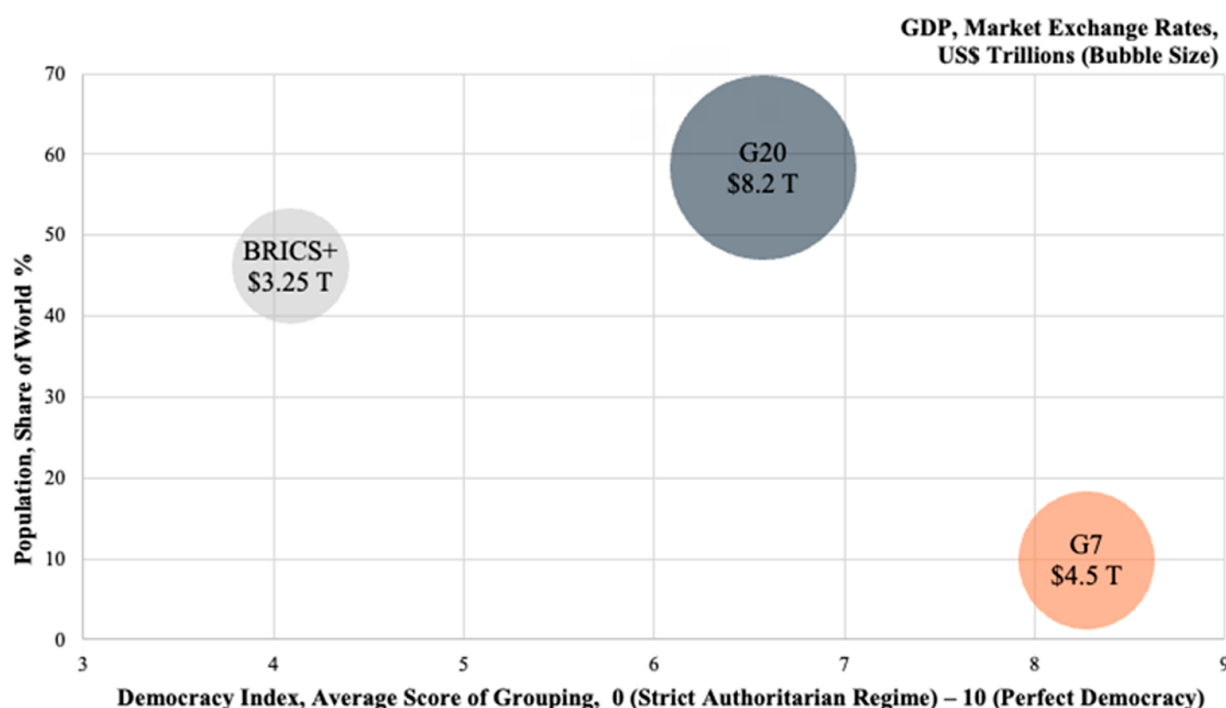
Dividing up the world has been tried in the past, including the Treaty of Tordesillas (1494) that attempted to divide the world into geographic zones of control between Portugal and Spain. The dividing lines between countries of the East and West during the Cold War were very real and consequential, and some were formalized. Under such pathways of this scenario, middle powers would have to adjust to fundamentally new realities, which would presumably offer great uncertainty as well as scope for power positioning within it.

Under the third scenario, one can easily imagine the formation of “blocs” (Samson, Kalash, Zivkovic, Forrest, & Bessma Momani, 2024, p.15) around economic or

¹ Brazil, Russia, India, China and South Africa (BRICS) have expanded to include Egypt, Ethiopia, Iran and the United Arab Emirates. Further expansion is under discussion and anticipated.

security alliances, or both. To some degree, these dynamics are already playing out via choices for democratic or authoritarian governance models (see Chart 2 below on governance divergence across the G20). It is also taking place in the economic space with, for example, restrictions on semi-conductor exports, and many major industrialized countries recently placing or considering tariffs on Chinese electric vehicles for economic and national security reasons. Similarly, China's massive investments through the Belt and Road Initiative in many countries create strong new economic partnerships and state-to-state dependencies. On the security side, the establishment of the diplomatic partnership of the Quadrilateral Security Dialogue (QUAD) between Australia, India, Japan, and the United States may foretell tighter security or other alliances to follow. Middle power countries are in the thick of these dynamics and might need to “pick sides” in some cases or decide to take an independent route. It is certainly possible to see two major blocs forming, one centred around the USA and another around China, with India, and perhaps some other large emerging markets like Brazil, positioned partly in both.

Chart 2. Growing divergence in international Governance models



Source: CIGI (2024a). IMF WEO October 2022; Democracy Index (2022) from the Economist Intelligence Unit

There are many possible variations of how different “blocs” scenarios would play out, some potentially squeezing middle powers and others offering scope to them to serve as bridges between divided pieces of the blocs. On the other hand, one could envisage the possibility of middle powers getting squeezed into very tight choices and trade-offs. For example, an America-first agenda taken to the extreme could ultimately drive an increasingly closed “fortress” North America where Canada and Mexico are offered little maneuvering room between being inside or outside. The middle powers of South America could also be potentially pulled further

into a strong America-first gravitational force but would also likely have greater maneuvering room. It is unclear what the implications of a fortress approach in the Americas would be for security alliances and economic arrangements with more geographically distant middle powers like Japan and South Korea.

The momentum of “blocs” emerging is currently strong, and many historical examples show how shared interests can often weaken or break down existing assumptions and alliances. For example, in the tense international times of the early 1930s, there were expectations that the highly anticipated Economic Conference of 1933 could make a breakthrough on international economic cooperation. It was not to be, and the fraying of cooperation between close allies was evident in the correspondence sent by the US Ambassador in Great Britain (Robert Bingham) to the US Secretary of State (Cordell Hull). The telegram noted that.

The Prime Minister [Ramsay MacDonald] continued, that with the breakdown of the Economic Conference there was no coordinated leadership today, certainly among European nations, to lead the world towards economic reconstruction. The corollary was the development of competitive blocs in Europe (Fascist, Danubian, Gold, et cetera) which tended towards international economic breakdown. The Prime Minister referred to the Economic Conference and the hopes in which it was conceived (Bingham, 1933, p.1).

This example demonstrates the complexity of geopolitical dynamics in alliances and blocs, and the potential for unexpected outcomes.

There are so many different episodes relating to bloc dynamics in history, although each one represents different players and context. European history at the close of the 19th century saw the creation of several security arrangements or blocs. The Triple Alliance treaty (Germany, Austria-Hungary and Italy) pledged mutual support should any one of the member states be attacked by another great power. Largely in response, the Triple Entente (France, Russia and Great Britain and Ireland) built an informal agreement between themselves as a counterweight to the Triple Alliance. Following the Russo-Japan war of 1904/05, Triple Entente coalition expanded to include the Franco-Japanese Treaty (1907), which further strengthened commitments between the partners in the years before World War 1.

Although not explored in detail in this article, under the fourth “disorder” scenario (Samson, Kalash, Zivkovic, Forrest, & Bessma Momani, 2024, p. 21), there could be key roles that emerge for middle powers in a world where wars continue to build and fester or fall into a tense form of multipolar cold war. With the risk of global confrontation and war elevated, middle powers could have key roles in diplomacy and in proposing cooperative ways to peace and prosperity.

The “transformation” scenario (CIGI, 2024b, p. 27) imagines a world order utterly changed by a huge, systemic force or phenomenon. In the first example—accelerated climate change—the impetus is either by the scale and scope of the negative impacts on people and economies or by fundamental changes through a green transition that ushers in new sustainable models for economics and society. In the

other pathway explored, digital transformations also change the basic economic and social framework of the way the world works, particularly if artificial general intelligence (comprehensively matching human capabilities on almost everything) is achieved and diffused, or even beyond that with super intelligence (comprehensively surpassing human capabilities on almost everything).

It is assumed that a transformation scenario would lead the global order to an entirely fresh destination because of one or more critical shocks to the international system. There is an endless list of potential known and unknown shocks that could trigger a global transformation, including a new global pandemic or financial crisis, social revolution or something entirely unknown.

Relating to perhaps most of the scenarios for changing world order, there have been periods in history when various powers found ways to work in “concert.” Diplomacy during the “Concert of Europe” that arose after the Congress of Vienna, found a way to maintain a balance of power and spheres of influence “by using alliances for mutual restraint, rather than security” as a sort of mutual dependency relationship that was nevertheless precarious (Schroeder, 1974, p.18). Under this arrangement, powers reciprocated in moderating their internal and competitive policies with restraint.

Conclusion

In the current context, there may be ways for the emerging order “...to accommodate rising powers and tolerate greater diversity” with existing policy frameworks and institutions that do not dominate and emerging and developing economies are “granted greater leeway in managing their own economy, society, and polity” (Rodrik & Walt, 2024, p. 257). Rodrik and Walt’s “meta-regime” approach would:

not require states to commit in advance to any particular substantive outcome... [and] relies not on nations’ goodwill but their self-interest—in particular, their desire to avoid a host of worst-case outcomes, and reap the benefits of as much cooperation as can be sustained (p. 266).

The bottom line is that the role of middle powers has always been context-specific, particular to their era and period. Today, it remains a more dispersed and fragmented multipolar global power structure represents an opportunity for middle power countries to seize more leadership in international relations and potentially creates new threats to independence.

Many middle powers have long been champions of the order that emerged following 1945. Today, there is a new set of global challenges, and the players have changed. Middle powers will need to evolve their strategies, including towards existing global institutions and evolving governance models.

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