



THE PILOT

Pacific Forum Policy Briefs

THE STRATEGIC AWAKENING OF MIDDLE POWERS

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“The powerful have their power. But we have something too—the capacity to stop pretending, to name realities, to build our strength at home and to act together.”

With those words during a landmark [speech](#) at the World Economic Forum in Davos last month, Canadian Prime Minister Mark Carney called on middle powers to act independently amid intensifying major-power rivalry and rising differences between the United States and its allies of late, especially over Washington’s interest in acquiring Greenland.

This is the latest sign that we are entering a new world, one dominated by major powers—the United States and China—and a rising number of countries increasingly able and willing to protect and assert themselves, as well as shape the course of international events.

These countries are “strategically autonomous,” i.e., they can make decisions and act alone or with partners, and by choice, even if doing so diverges from the preferences of others, including major powers. They can defend themselves and impose their will on many, even though they are limited by their power and interdependence. Still, while weaker than major powers, they are stronger than “rank-and-file countries”: they are middle powers.

Drivers

The emergence of strategically autonomous countries—think India, Indonesia, France, Germany, Saudi Arabia, Turkey, or Brazil—is a relatively new development.

During the Cold War, the world was dangerous and divided, and thus fertile for the pursuit of strategic autonomy by countries unwilling to participate in the US-Soviet contest. In practice, however, most countries were too weak to do so. The Non-Aligned Movement reflected a widespread desire to escape superpower

dominance, but its limited effectiveness underscored the difficulty of attaining strategic autonomy.

By the end of the Cold War and in the years that followed, several countries had become capable powers, but the interest in becoming autonomous had vanished because the international environment had become stable, prosperity was rising thanks to globalization, and the United States, enjoying its “[unipolar moment](#),” upheld international rules and norms.

Today, not only have many more countries become increasingly powerful, but the need for strategic autonomy is re-emerging, for three reasons.

First, because of the return of crises, conflicts, and wars: in Ukraine, Gaza, and perhaps soon between the United States and China. Self-reliance has therefore become a matter of national survival.

Second, many countries pursue strategic autonomy because global interdependence is fracturing and the logic of geoeconomics is replacing the logic of globalization: the idea that “markets will integrate the world for everyone’s benefit” has given way to the idea that “countries, with their friends, must control economic interdependence to advance their interests.”

Third, many countries want strategic autonomy because the United States is both less able and less willing to play its traditional role of leader and guardian of the current international order, as suggested in the new [National Security Strategy](#) and [National Defense Strategy](#).

Dynamics

To become strategically autonomous, countries must build national power.

This begins with developing a strong defense. On every continent, countries are doing just that. Recently, NATO countries [agreed](#) to spend 5% of their annual gross domestic product by 2035 on defense, a significant upward shift from earlier commitments, while Japan, South Korea, and Australia are implementing major increases as well. These increases will improve these countries’ freedom of action.

Attaining strategic autonomy also requires regaining control over global interdependence through economic statecraft. Many more countries now incentivize local production, especially of goods and

services deemed strategic, and push procurement linkages with trusted partners.

So, post-pandemic, the United States, the European Union, Brazil, India, and others have sought to re-shore, near-shore, or friend-shore medical and pharmaceutical supply chains to reduce dependence on China. They have done the same with steel and electric vehicle batteries.

Finally, becoming autonomous requires flexible diplomatic engagement, i.e., diverse relationships to reduce dependence on traditional powers and assert greater control over foreign policy.

Of late, most European, Asian, and Middle Eastern countries have broadened their partnerships beyond the United States. Many such countries also engage multilateral organizations to protect autonomy and increasingly form multilateral groupings to collaborate without ceding decision-making control, as is the case of the Quadrilateral Security Dialogue, which facilitates coordination between Australia, India, Japan, and the United States on regional security without treaty constraints.

Limits

Going strategically autonomous remains challenging, however.

Building a strong defense is difficult because modern military capabilities are expensive, even for middle powers. Few countries can sustain the necessary investments without creating domestic strains. Even if countries build such a military, they often depend on foreign technology, weapons, or components, and need time to develop expertise to operate modern forces.

For example, despite the European Union's push for joint procurement and defense funds to reduce reliance on NATO and the United States, EU members remain dependent on US intelligence, logistics, and deterrence.

Seeking economic and technological autonomy is equally difficult, as is control over resources critical to national survival because interdependence is "sticky": countries cannot unbuild it instantly or insulate themselves from it easily.

For example, China's "dual circulation" strategy, meant to reduce reliance on Western technology and boost domestic innovation, has faced limits. China has made progress in electric vehicles and artificial intelligence but remains dependent on Western semiconductors and critical software. So, even the world's second-largest economy can't decouple from global technological and supply networks. No wonder the European Union struggles to reduce its dependence on Russian gas.

Diplomatic diversification, another key feature of strategic autonomy, is not problem-free either.

Partnering with the United States and China is difficult because the pressure to choose between them is real and rising. Another problem is regional constraints. European countries may want to do more in Asia but challenges on their continent, notably the war in Ukraine, stand in the way. Yet another issue is that middle powers can shape decisions but can rarely drive outcomes. Despite middle-power coordination in favor of phasing out fossil fuels, the [final text](#) of the 2025 United Nations Climate Change Conference sidesteps such a commitment due to resistance from major producers.

An autonomy-centered world is thus emerging but hasn't materialized yet: there is strategic distancing from today's world, not strategic divorce.

US options

An autonomy-centered world can provide major benefits to the United States.

It can help solve a longstanding US problem: getting US allies and partners to shoulder more defense tasks. If more countries create new critical-technology supply chains or become new economic centers, global systems will also become less brittle as they will be less dependent on a handful of providers or, in some cases, one—China. Furthermore, the United States can gain negotiating partners more easily because more countries can engage the United States bilaterally (or multilaterally) instead of through alliances or blocs.

An autonomy-centered world is not cost-free for the United States, however.

The most obvious cost is the erosion of US influence. More autonomous countries mean more countries able to make independent decisions, regardless of whether it comports with US preferences. The United States will thus become less able to set the agenda and dictate its terms. US influence will remain significant, and in many cases the United States will still be able to impose its will, but its ability to do so will decrease.

In addition to costs, an autonomy-centered world brings major risks for the United States.

One risk is that US partners make choices that lead to incompatible systems, command problems, or delayed coalition responses. Another is that US allies decide to take care of their own defense, such as by developing their own nuclear weapons, or that they side with US competitors. There is also a risk that framing strategic autonomy as industrial self-reliance leads to protectionism, higher costs, and slower innovation. Yet another risk is the emergence of competing blocs, as opposed to today's loose coalitions, which would repolarize the world and complicate US power projection.

In these circumstances, the United States should encourage autonomous countries to act independently but within a framework sustaining coordination, cooperation, and shared rules and norms, i.e., not in ways that dilute collective leverage or invite fragmentation.

In defense, the United States should urge allies, partners, and others to build capabilities that complement, not compete with, US alliance structures, and should push them to do so in a way that enables interoperability with US forces.

The goal is simple: keep allies on its side and attract new partners.

In economics, in addition to scaling up its industry in cutting-edge areas, the United States should pursue targeted restrictions and safeguards for security-sensitive sectors while preserving open markets and promoting allied industrial cooperation.

Through shared research and development, pooled procurement, and export control harmonization, the United States should cultivate and coordinate allied "industrial basins" for semiconductors, batteries, rare earths, and pharmaceuticals so that allied markets remain open but increase their resilience. The recently announced [Pax Silica](#) initiative is promising.

The goal is clear: enhance economic security to advance US and allied interests, while limiting potential protectionist blowback.

In an emerging autonomy-centered world, the United States can thus maintain the upper hand if it leads by convincing, enabling, and embedding, i.e., if it convinces its allies and partners of shared interests, enables them with capacity and incentives, and embeds

common rules, norms, and standards so that their autonomous choices converge towards an open, resilient, and well-regulated international order.

That approach—leadership through influence, empowerment, and structure rather than power and dominance—is anchored in the belief that for one to lead others must want to follow. The United States should recognize that this approach will pay dividends and embrace it swiftly.

The Pilot commentaries and responses represent the views of the respective authors. Alternative viewpoints are always welcomed and encouraged. Please write to rob@pacforum.org for more information on how to contribute.