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Emerging Middle Powers Report 2026



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Workarounding the Superpowers

There is a new playbook for tech middle powers – and it is yielding results. By Laura Mahrenbach and Maximilian Mayer

Canadian Prime Minister Mark Carney's much-commented January 2026 speech in Davos signalled a pivotal change in global affairs: the future would be shaped by middle powers. This middle-power agency goes beyond balancing or aligning with great powers. Instead, today's middle powers are 'workarounding' via small group, interest-led, informal cooperation that excludes China and the United States. This approach allows middle powers to pursue technological advances and security without being locked into the orbit of either Beijing or Washington. It reflects a world where strategic autonomy is prized but difficult to achieve alone, where collaboration is necessary but occurs selectively and outside traditional institutional settings.

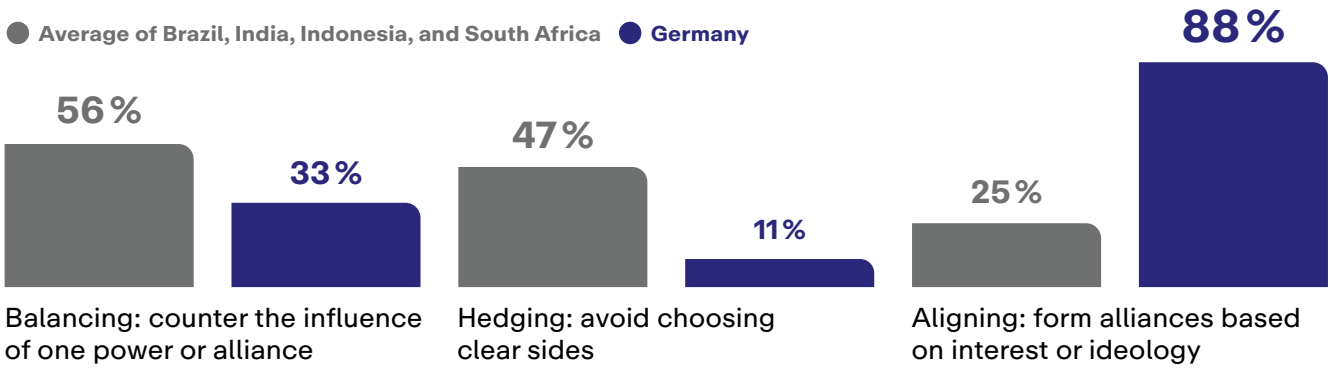
Our Tech Middle Power Cooperation dataset shows the 'workarounding moment' occurred three years ago, with a sudden increase in small group, tech cooperation. This workarounding spans the globe but is most prominent in Asia, Europe and the Middle East. It is mostly multi-sectoral, as in the 2023 digitization and electronic manufacturing agreement between India and Saudi Arabia, but single-sector cooperation also occurs, especially in energy, digital innovation and defence. One example is the 2024 nuclear energy cooperation agreement between Czechia and France.

> 'China and the United States are hardening their spheres of influence in critical domains like AI, quantum computing and space.'

For countries positioned between superpowers and less technologically advanced states like India, Germany, South Korea and the United Arab Emirates, this is a story of adaptation. China and the

Balancing the powerful

Which of these strategies should your country adopt internationally?





United States are aggressively courting partners to secure supply chains and talent while hardening their spheres of influence in critical domains like artificial intelligence (AI), quantum computing and space. Simultaneously, multilateral organizations, long the focus of middle power foreign policy, are floundering. Workarounding provides a way to sidestep superpower coercion, secure multi-issue, short-term gains and enhance national technological capabilities.

> ‘The question is whether workarounding could be institutionalized.’

The implications of this trend for the global order are not yet clear. One question is whether workarounding could be institutionalized and whether middle powers want it to be. For instance, our research shows middle powers can use this approach to support and develop fledgling multilateral institutions, particularly in the climate and energy transition fields. They may also seek to adopt multilateral techniques in workarounding or multilateralize partnerships and outcomes developed via workarounds.

Yet other evidence suggests workarounding will not always lead to institutionalization because its characteristics – flexible, informal, interest-driven, small – fit better with government needs in areas like defence and space. A recent example is the drone and air defence collaboration between the Gulf states and Ukraine emerging in response to the Iran conflict.

In other areas, the gap between tech middle powers and China and the United States is so large that workarounds may be ineffective in achieving shared goals. Middle powers cannot match these leaders’ investment, talent or infrastructure in AI and continue to depend on their AI technology. China and the United States will continue to exploit these advantages, whether through market leverage like China’s rare-earth export controls or allegedly win-win initiatives like the US’s Pax Silica.

> ‘Middle power workarounding will persist because it has already paid off for tech middle powers.’

So workarounding will shape the global order, but not on every issue or location. Middle powers will continue to rely on diverse strategies and adapt these to changing circumstances. Ultimately, the fast-moving techno-political landscape may both reflect and determine which strategies are most effective. For instance, once the hype surrounding large language models has quieted, maybe different types of AI will emerge. Maybe these technologies will result from middle-power workarounding, boosting middle powers’ autonomy and leadership capacity. But maybe they will not, reinforcing the privileges of the AI leaders.

Regardless of how geopolitical and technological contexts evolve, middle-power workarounding will persist because it has already paid off for tech middle powers. Workarounding not only offers the flexibility to adjust to increasingly coercive great-power behaviour. It offers middle powers the opportunity to define the next phase of global order – quietly, flexibly, and on their own terms. ↖



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