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**Munich Security Conference 2026:  
Destruction or Realignment?**

**By**  
**Eva Kristinova**



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Eva Kristinova

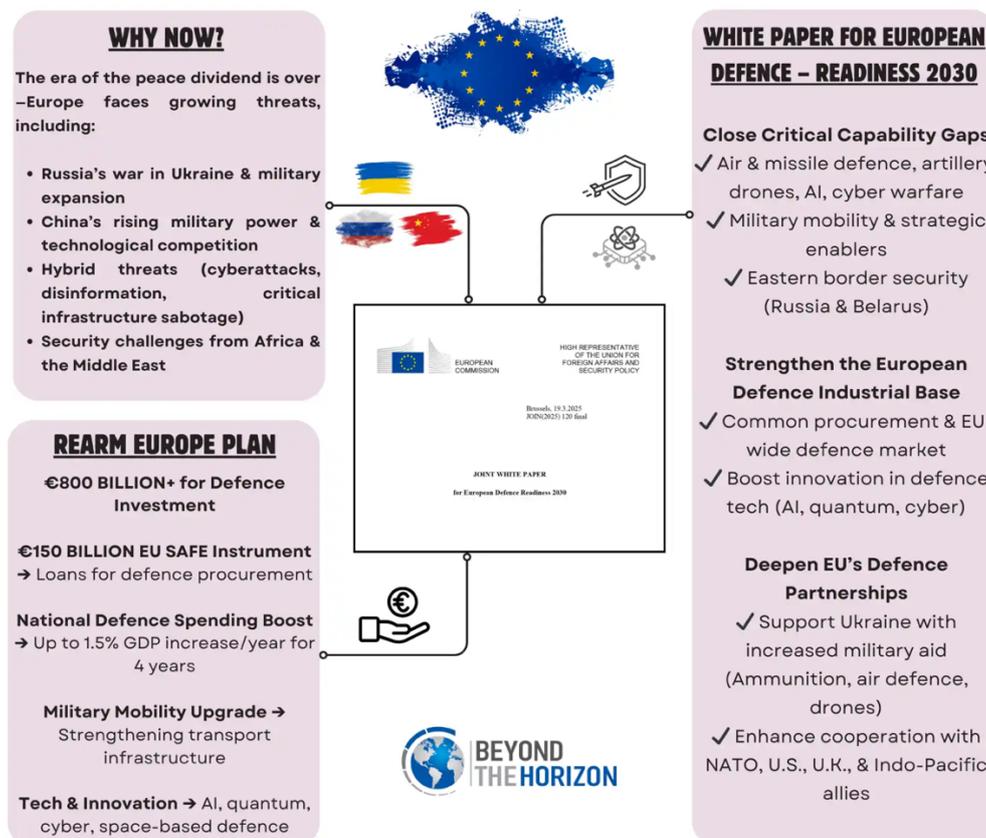
**Munich Security Conference 2026: Destruction or Realignment?**

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**Executive Summary**

- ✦ The MSC 2026 revealed a shift from short-term transatlantic tensions towards a deeper structural change in Europe’s long-term security.
- ✦ Despite rhetorical reconciliation from the U.S., trust has been shaken by policy divergence and the most recent Greenland incident. Europe thus acknowledges the need to maintain stable relations with the U.S., but aim to no longer rely on it for comprehensive security.
- ✦ The conference signalled that Europe is entering a phase where it must translate uncertainty into concrete strategic choices. Practical steps in joint procurement and major EU-level investment indicate that Europe is already operationalising this shift.
- ✦ At the same time, the rules-based international order is undergoing a contested structural transformation, with agreement on the shift without consensus on its intended aim.
- ✦ Europe faces both risk from challengers and great-power politics, and opportunity for clearer purpose, stronger capabilities, and diversified security architecture as realignment accelerates.

**Key Picture: European Defence Readiness 2030 & Rearm Europe Plan**



Source: [Beyond The Horizon](#)

## The Future of European Security

The 62<sup>nd</sup> Munich Security Conference (MSC) took place from 13<sup>th</sup> to 15<sup>th</sup> February 2026, bringing together leaders from around the world, but especially the European continent, to discuss the direction of the current geopolitical environment, and its repercussions for a secure and stable international order. For many European leaders in particular, the central message of the conference of just last year echoed resoundingly throughout the main stage – after a scathing attack on Europe’s “civilizational erasure” from U.S. Vice President J.D. Vance in 2025<sup>1</sup>, and recent tensions with the Trump administration over Greenland, many were bracing themselves for another year of transatlantic struggles.

Instead, the conference took on an atmosphere of deeper, structural change; of firmer resolve for strategic autonomy, despite clear burdens ahead, but also cracked open a window of opportunity. As, according to a multitude of voices, the post-Cold War international order witnesses a reshuffling not seen in decades, countries are vying for the best position to maintain stability and security. The MSC 2026 likely signals a beginning in the implementation of the strategic shifts that are bound to follow.

### Pressing Issues: Ukraine and Greenland

Despite the prominence of broader structural issues in European security, including the weaponisation of trade instruments, space policy, climate change, nuclear security, hybrid warfare deterrence, and artificial intelligence<sup>2</sup>, the conference put overwhelming focus on the pressing issues of continued conflict in Ukraine, and the most recent crisis in Greenland<sup>3</sup>. In the case of the former, Europe is acutely aware of its current diminished role.

Although the brunt of support for Ukraine has shifted onto European shoulders, since the U.S. cut its Ukraine aid by an estimated 99% in the past couple of years<sup>4</sup>, the peace negotiations, headed by the U.S., show a notable absence of European voices. Calls for Europe’s greater participation in negotiating peace in Ukraine have been abounding since their beginning, especially since Europe will likely also be expected to shoulder most of the new security guarantees given to Ukraine<sup>5</sup>. The conference saw a renewed force behind these arguments, not the least from Ukraine itself.

At the same time, Europe has had to contend with a crisis in the High North, which many regional leaders feel is far from over<sup>6</sup>. On the one hand further undermining the transatlantic alliance, the crisis has also returned the spotlight on the Arctic region<sup>7</sup>, which has been rising in prominence in the geopolitical sphere in recent years. The MSC 2026 gave a new spirit to Nordic cooperation, NATO activities in the High North, as well as pledged support from third parties like the UK. While in the public sphere the crisis has largely subsided, negotiations about the role of the U.S. in Greenland are ongoing with the territory’s leadership and Denmark. The latter refuse to compromise on issues of territorial sovereignty but admit there might be space for greater American participation, military and otherwise<sup>8</sup>.

### The Transatlantic Partnership

Europe without American security guarantees is a largely far-fetched picture in current geopolitical dynamics. The U.S. National Security Strategy, published in November 2025, codified divisions that had been surfacing at least since Vance’s MSC speech in February, and these divisions reached a first crisis point with the recent Greenland incident. At the same time, the interest of the U.S. is far from leaving Europe unprotected. Despite the continuity in the words of Vance in 2025 and Secretary of State Marco Rubio in 2026, especially with regards to Europe’s civilisational heritage and anti-immigration rhetoric, the latter proved to be more amendable to jointly finding solutions to divisions about how to best create a secure and stable Europe<sup>9</sup>. European leaders, while equally understanding the importance of the U.S. for the future of their continent’s security, have begun to look elsewhere for the sake of complete certainty<sup>10</sup>. As many rightly point out, Europe is waking up.

This does not mean that the road to strategic autonomy will be without obstacles. Recently exposed divisions between leaders of the EU and NATO on what the future of security in Europe will look like have served as early signs for caution on premature forecasts of unity and determination<sup>11</sup>. The emerging picture is a more fragmented one, with regional cooperation at the forefront. These developments may not sound very optimistic for some, but their potential is undeniable. A targeted, “total defence” approach<sup>12</sup> to European security may just be what the continent needs to balance capabilities, while maintaining a cohesive front of strength. The success of these early agreements and initiatives, including the Nordic-Baltic joint procurement projects, and the Franco-German consultations on extending France’s nuclear umbrella, will likely determine the future orientation of security architecture-building in Europe.

There are two outcomes this is likely to have for the United States. On the one hand, Europe may create just the geopolitical and security environment that both Vance and Rubio call it towards, albeit using their own means to achieve this end. On the other hand, with U.S. defence focus turning towards the Western Hemisphere and East Asia, a stronger Europe will be in a position to be a responsible partner to the United States in other foreign policy endeavours. Before the latter can come to pass, however, the U.S. also has to demonstrate loyalty to its allies, forgo causing alarm in Greenland and elsewhere, and allow Europe to develop the kind of regional leadership it demands.

### Going It Alone: Achieving Strategic Autonomy

However conciliatory America’s tone, a consensus has emerged in Europe about the need of European allies to play a stronger role in their own security, both within NATO, and beyond it. While the U.S. sees this future unfolding in a way that provides more opportunities for the American defence industry<sup>13</sup>, European leaders are not so keen on beating the American drum exclusively. National leaders individually, and as a part of the European Union (EU), have indicated as much.

This was particularly evident from the speech given by the German Chancellor Friedrich Merz, who underscored both the need America has for Europe, as well as the need for Europe to step up<sup>14</sup>. Pointing to Germany’s own efforts, Merz made it clear that for his leadership, Europe’s security was no longer “an obligation, but a strategic necessity”<sup>15</sup>. To this end, he announced the negotiation to extend France’s nuclear umbrella to Germany, and potentially beyond, which has been confirmed by the French President<sup>16</sup>. Indeed, the question of autonomous nuclear deterrence is one particularly important for Europe at a time when Russia’s war continues to rage on, and Ukraine begins to seek security guarantees for the future.

Both the High Representative Kaja Kallas<sup>17</sup>, and the European Commission President Ursula von der Leyen have reflected on European security through the EU lens. The organisation currently has a provision for mutual defence, though one that is sorely underused in light of NATO guarantees. A stronger European pillar in NATO needs to take shape<sup>18</sup>. Accordingly, von der Leyen called for a review of Article 42.7, which would provide for such mutual defence. Indeed, a number of initiatives have been put forward in this direction<sup>19</sup>.

In November 2024, Poland signed a strategic partnership with Sweden, encouraging, among other things, greater participation of businesses in the future of European security in the region. Together with Lithuania, Poland also signed agreements deepening cooperation with Sweden on the defence of the Baltic Sea area<sup>20</sup>. Subsequently, Estonia suggested that resources should be pooled to repair critical infrastructure in the Baltic Sea<sup>21</sup>, which had often been targeted by Russia’s hybrid attacks. while also emphasising the importance of third-country partnerships.

The Nordic bloc is not far behind. Some of the most ambitious project include joint procurement of vehicles and Sweden’s domestic development of a space program. The case of the former began in April 2025, when Sweden, Lithuania, Norway, and Finland proposed an agreement on the joint purchase of CV90 infantry combat vehicles, manufactured by Sweden-based subsidiary of Britain’s BAE Systems<sup>22</sup>. The declaration of intent was signed on 5<sup>th</sup> June 2025, with the additional participation of Estonia and the Netherlands. The recent crisis over Greenland

has also put the Scandinavian region on high alert, and existing projects have become more urgent accordingly. Among these is the development of a domestic space program, headed by Sweden and Norway, utilising newly planned and existing launch bases in the Arctic<sup>23</sup>. These regional efforts are further underpinned by an EUR 800 billion programme to boost European defence through the EU<sup>24</sup>, as well as a call for expanding partnerships with third countries such as the United Kingdom, Canada, Australia, and India<sup>25</sup>. The MSC 2026 thus marked the catching-up of diplomacy with practical developments already underway.

### **The Future of The ‘Rules-Based International Order’**

A key theme of the MSC 2026 was also the future of the so-called rules-based international order as we know it, which traces its origins to the post-WWII era, and properly took its shape after the end of the Cold War<sup>26</sup>. The perceived re-shaping of the international order became the theme of a number of speeches, from the German Chancellor to the U.S. State Secretary, to the Chinese representative. One thing is clear: change is in the air. Yet consensus about the state of the international order, and its likely metamorphosis, has not emerged<sup>27</sup>. According to outward analyses, the world is reshaping to give rise to a new era of ‘great power’ relations, with regional hegemony at the forefront. This is also supposed to make the coming period of geopolitics more multipolar<sup>28</sup>. What does this mean for Europe and beyond?

Voices from the U.S. stress the new strength of American leadership, which is supposed to drag the international order out of its stupor, making it stronger in the long run<sup>29</sup>. This interpretation is not being shared by America’s allies. For Europe, the rise of new great power politics, whether in the guise of U.S.-Russia accord in Ukraine, or the space China and India are attempting to carve out for themselves, only brings greater uncertainty. The need to build a place for Europe is one that leaders are increasingly aware of.

The sentiment was expressed by Germany, and the UK among others. Far from making it stronger, Europe recognizes that a world “where power is more diffuse and alliances are more fluid” leaves the continent weaker if it does not prepare sufficiently<sup>30</sup>. In this atmosphere of uncertainty, China alone stood out with its seemingly unified vision, presenting themselves “as the guardians of multilateralism, as the protector of small and medium sized countries, as the guardians of the rules-based order”<sup>31</sup>. Although Europe might find the economic incentives that come with Chinese partnerships enticing, it is far from reckless in its approach to find its place in the current geopolitical climate.

### **Destruction or Realignment? Opportunists and Challengers**

The debates at MSC 2026 made it clear that the international order is entering a period of profound transition, yet no shared vision has emerged to guide it. The MSC report took to the language of “destruction”<sup>32</sup>, while a more appropriate term for the situation might be realignment. For Europe, this moment is as much a warning as it is an opportunity. Its leaders realise that Europe must define its own role with greater clarity, invest in the capabilities that underpin strategic autonomy, and navigate partnerships with both caution and foresight. The emerging international order demands adaptability and self-determination, whether it takes the shape of renewed cooperation or intensified great-power rivalry. In some ways, it may very well be both. The outcome is not only dependent on U.S. ambition, or China’s challenge, but also on Europe’s willingness to shape events rather than simply respond to them.

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