



Commentary

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Commentary # 23

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Hard Power, Hard Choices: Key Takeaways from Munich 2026

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Hard Power, Hard Choices: Key Takeaways from Munich 2026

The 2026 Munich Security Conference did not produce a dramatic rupture in transatlantic relations, nor did it unveil a new grand strategy. Instead, it marked something more consequential: the consolidation of a European shift toward strategic responsibility, accompanied by a recalibration — rather than retreat — of American leadership.

Four years into Russia's full-scale invasion of Ukraine, Munich 2026 was defined less by declarations of unity than by structural adjustment. The underlying message was consistent across the conference: Europe must assume primary responsibility for its own defence — not as an alternative to NATO, but as a precondition for sustaining it.

War as Structural Reality

President Volodymyr Zelensky framed the war not as a prolonged crisis, but as a structural confrontation that will shape Europe's future security order. His intervention underscored the scale of Russian attacks, the growing sophistication of drone warfare, and the persistence of hybrid tactics. The central warning was clear: time favours the aggressor unless countered by sustained and decisive military support.

Zelensky's insistence that security guarantees must precede any political settlement — rather than follow it — reflected Kyiv's scepticism toward diplomacy unsupported by credible deterrence. His references to delayed weapons deliveries in earlier phases of the war carried an implicit lesson: hesitation has strategic costs. Strength, in his formulation, is not escalation but acceleration toward peace.

Few in Munich openly challenged that logic.

Europe's Shift: From Solidarity to Rearmament

The most striking development at Munich was the degree of convergence among European leaders around defence responsibility and industrial capacity.

European Commission President Ursula von der Leyen framed the moment as one of "independence," carefully defined not as separation from the United States, but as Europe assuming primary responsibility for its own security. Her remarks went beyond spending targets. She outlined a structural reorientation: mobilising up to €800 billion through European instruments, strengthening the credibility of the EU's mutual defence clause (Article 42.7), scaling production in drones, air defence, and strategic enablers, and embedding security considerations into trade and industrial policy.

British Prime Minister Keir Starmer complemented this approach with blunt clarity: "Hard power is the currency of the age." His call for a "more European NATO" signalled not institutional duplication, but internal rebalancing. Notably, he linked deeper UK-EU economic cooperation to defence industrial integration, marking a further step away from post-Brexit distancing. The language of interdependence — rather than autonomy alone — suggested a deliberate effort to reconcile European capability-building with alliance cohesion.

German Chancellor Friedrich Merz and French President Emmanuel Macron reinforced similar themes, particularly the urgency of overcoming fragmentation in European procurement. References to multiple tank platforms, aircraft systems, and naval projects underscored a growing recognition that inefficiency has become a strategic liability. Coordination, standardisation, and industrial scaling are no longer technocratic concerns but security imperatives.

Taken together, the European message was less about ambition and more about implementation: spend more, integrate more deeply, and accelerate decision-making — including reconsidering procedural constraints where necessary.

The United States: Engaged but Expectant

The American contribution to Munich reflected continuity in commitment but adjustment in emphasis.

Secretary of State Marco Rubio presented the current phase of the war as a strategic test: assessing Russia's seriousness about negotiations while maintaining military support and readiness to increase economic pressure. Congressional voices reinforced this dual-track approach, combining sustained assistance to Ukraine with potential new energy sanctions targeting Russian revenue.

At the same time, American rhetoric increasingly framed European responsibility as an expectation rather than an aspiration. The United States remains militarily and diplomatically engaged. However, the underlying premise has shifted from American primacy to shared burden.

This recalibration does not suggest withdrawal. Instead, it points toward a division of labour in which Europe leads on conventional defence capacity within its theatre, while the United States continues to provide strategic enablers, intelligence, and broader deterrence architecture. As several European leaders acknowledged, this is becoming the operational baseline of the alliance.

Ukraine at the Centre of Europe's Security Debate

Zelensky's intervention introduced a sharper dimension to the broader consensus. He rejected any settlement that would legitimise territorial aggression or rely on ambiguous security assurances. His warning against a repeat of historical appeasement scenarios served as a reminder that partial solutions can embed future instability.

At the same time, he advanced a forward-looking argument: Ukraine's wartime innovations — in drone production, battlefield adaptation, and rapid industrial scaling — constitute strategic assets for Europe. Integrating Ukraine more closely into European defence structures, in this view, is not charity but mutual reinforcement.

While leaders stopped short of endorsing immediate NATO accession, the debate revealed diminishing patience for prolonged strategic ambiguity. The credibility of guarantees — formal or informal — is now central to deterrence calculations.

Convergence — and Its Limits

Munich 2026 displayed significant convergence around defence spending, industrial policy, and the need for European responsibility. Yet several tensions remain.

First, the balance between EU-level coordination and NATO primacy remains carefully managed. European leaders increasingly speak the language of autonomy, but none question NATO's foundational role.

Second, proposals to streamline EU decision-making — including potential expanded use of qualified majority voting in defence-related areas — signal a willingness to revisit long-standing political constraints. Whether such discussions translate into institutional reform remains uncertain.

Third, while unity persists, Zelensky's pointed reminders about delayed support and negotiation dynamics reflect underlying concerns about fatigue, escalation management, and political sustainability.

Still, the dominant tone was one of adaptation rather than division.

Immediate Implications

Three immediate implications stand out.

First, European defence industrial policy has moved to the centre of strategic credibility. The test now lies not in announcements but in contracts, production lines, and delivery timelines.

Second, the transatlantic relationship is entering a more balanced — and more demanding — phase. Sustained American engagement will increasingly be linked to visible European burden-sharing and operational readiness.

Third, Ukraine remains both the frontline and the litmus test. The durability of Western unity, the enforcement of sanctions, and the ability to sustain high-intensity support will shape not only the war's trajectory but the architecture of European security for years to come.

Munich 2026 did not resolve these structural questions. But it clarified the direction of travel. The era in which Europe could rely predominantly on American security guarantees while maintaining fragmented industrial and political coordination appears to be closing.

What is emerging instead is a Europe that speaks more openly — and more consistently — about hard power, industrial mobilisation, and strategic responsibility. Whether this marks a lasting transformation will depend less on the speeches delivered in Munich than on the political will and material investments that follow.

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