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Recalibrating Europe's security: Building partnerships in an era of “wrecking-ball politics”

Sarah Bressan, Marie Krpata

The 2026 Munich Security Conference report observes that “the world has entered a period of wrecking-ball politics.” Indeed, the era of Western predominance, dependable alliances and capable multilateral institutions has given way to shifting balances of power and deepening uncertainty.

Few actors face this shift as acutely as the European Union (EU). Having helped construct the postwar order that is currently “under destruction”, and having derived immense benefit from it, the EU now finds the ground shifting beneath the very arrangements on which its influence rested. The central challenge for the EU is not how to defend a familiar system but how to remain secure and relevant in an unfamiliar one, with the ability to shape what lies ahead.

This paper addresses four important areas in which Europe must revise outdated assumptions to navigate the new emerging order: critical economic dependencies, European defence, democracy in the age of AI and international alliances.

Critical economic dependencies

Chief among these outdated assumptions is the belief that economics and politics can be separated, that industrial policy should only be minimal, and that Europe's economy can resist being increasingly treated as a security issue. Critical dependencies underscore this point. The U.S. Department of Defense, for example, recently took a direct equity stake in rare-earth mining company MP Materials – with a guaranteed price floor and a ten-year purchase commitment – showing that even the most

market-oriented governments treat the supply of critical raw materials (CRM) as a security issue.

Europe, meanwhile, has placed its trust in the idea that improving conditions for private investment is sufficient. However, it has stopped short of the direct demand- and price-shaping measures (revenue guarantees, sourcing rules for large buyers) required to make non-Chinese mining, processing and recycling projects commercially bankable, a stance criticised by some experts. The creation of a “Germany Fund” in 2026 to work toward the country's supply-chain independence and resilience demonstrates the beginning of a shift in mentality.

European defence

With regard to European defence, the highest priority should be overcoming obstacles to intra-European cooperation. Current hurdles include an unfinished EU internal market for defence, capitals putting national self-interest above cooperation, and a lack of a common threat perception. From 2020 to 2024, the US accounted for 64% of arms imports by European NATO countries. European capabilities are often not readily available, increasing dependence on third countries and weakening the EU's Defence Technological and Industrial Base (EDTIB).

Building European defence involves a trade-off between scaling up short-term production and strategically investing in the future. While Franco-German-Spanish prestige projects such as the Future Combat Air System (FCAS) have recently been abandoned due to rivalry among participating

industrial players, other armament cooperation projects such as the AI partnership between Helsing and Airbus are underway.

Now that Germany aims to build Europe's biggest conventional army, expectations are high that the country's increase in military spending will benefit the EDTIB and that the money will not be spent on foreign industrial bases. From a French perspective, concerns have been expressed that Germany's surge in military spending may weaken France's position as the EU's "military and strategic driver", a role that Germany now risks assuming. However, the strategic dialogue recently launched between France and Germany on nuclear "forward deterrence" underscores France's unique role within Europe as a nuclear power, potentially constituting an important step for both countries' cooperation in the field of security and defence. At the Franco-German Defence and Security Council held within the framework of the Franco-German Ministerial Council in Brühl in July 2026, progress on further cooperation projects such as the Main Ground Combat System (MGCS) and IRIS2 was discussed. Moreover, a possible joining of forces within SAMP/T air defence systems and the deployment of the Franco-German Brigade on NATO's Eastern flank were examined. This points to both countries' willingness to show greater resolve for joint action in security and defence.

Democracy in the age of AI

After years of debates about disinformation, hybrid warfare and social media regulation, the fight to protect democracy has shifted from the information to the infrastructure layer. Cutting-edge AI technology is increasingly not only the basis of industries, but the infrastructure of democratic processes. Consequently, Europe must redouble its efforts to seek alternative technological answers to those of the US companies that currently dominate the AI landscape. Arthur Mensch, CEO and co-founder of Mistral AI, underscored in a hearing at the French National Assembly that Europe must develop its own digital services as such services shape cultural representations, language and ethics.

The extent to which Europe can realistically compete with China and the US on frontier AI is heavily contested. However, everyday AI applications and critical infrastructure are key areas in which Europe must demonstrate whether there is a distinct "European third way" and what this might look like. Some European intelligence services, for example, have already switched from US data analytics providers such as Palantir to European ones such as Chapsvision to strengthen Europe's technological autonomy

New alliances

Building new alliances is vital not only for Europe's economy, defence and technological base, but also with respect to its broader role and influence around the world. In 2019, France and Germany initiated the Alliance for Multilateralism, while others argued that the global rise of autocracies called for an Alliance of Democracies. Neither project has ever truly taken off, however. In a more recent proposal at Davos in 2026, Canadian Prime Minister Mark Carney suggested forming more issue-specific coalitions among middle powers.

Europeans seem to share this new premise, diversifying and intensifying partnerships with Canada, India, Japan and South Korea. On critical economic dependencies, Europeans should partner with and learn from Japan, which reduced its import dependence on Chinese rare earth elements from 90% in 2010 to 60% in 2023, and Canada, under whose leadership the Critical Minerals Resilience and Production Alliance was set up within the G7, also including Australia. At the EU level, the Industrial Accelerator Act could be a key instrument for interest-based, trusted partnerships. This is characteristic of how the EU builds relationships: through market access, procurement budgets and regulatory standards rather than grand alliances (see the strategic partnerships of the Critical Raw Materials Act or the Clean Trade and Investment Partnership with South Africa). Lacking the hard-power instruments of Washington or Beijing, Europe's comparative advantage lies in making economic alignment worthwhile.

A similar logic applies to defence partnerships, such as the EU Security and Defence Partnerships with Japan and South Korea. Here, however, reality demonstrates

that building strategic partnerships requires dedication and effort to foster long-term trust. Take, for example, the partnerships between [France and India](#) and between [Germany and South Korea](#). France has supplied India's military since its independence. Today, India is the world's largest buyer of French defence equipment with France as one of its trusted partners, facilitating cooperation in other areas and at the EU level. On the German side, [cooperation with South Korea](#) has only really taken off since then Federal Chancellor Olaf Scholz's visit to Seoul in 2023 – the first dedicated bilateral summit between the two countries in around 30 years – which supported Germany's diversification. This requires sustained attention if the goal is to achieve the status of prime trusted partner.

The AI question appears to be the most challenging issue because developments and outcomes are so uncertain. Coordinating with countries that face similar challenges – and are caught in the crosshairs of US-China frontier model competition – can help Europe gain leverage and inspire solutions. South Korea, for example, currently plans to make a free national AI service conditional on domestic content: half of the usage must rely on Korean-built models, another 30% on models from other Korean firms, with foreign models used only where domestic ones fall short. This approach guarantees demand for domestic alternatives to US models even if the country cannot compete at the highest level.

Conclusion

A shifting global order and the erosion of the postwar order's key stabilisers require the EU to navigate rising uncertainty and complexity on the global stage. Outdated assumptions – that economics and security are separate issues, European capitals can afford fragmented defence, traditional alliances will hold, and the infrastructure of democracy takes care of itself – must be recalibrated if Europe wants to remain relevant a decade from now.

With high-stakes elections looming in large member states such as France, the EU's most important task is to turn its apparent weaknesses into a strategic advantage. The very rules and slow, technical

procedures often criticised for slowing the Union down can also make it predictable, fostering trust and reliability. The key is to ensure that this renders commitments durable and harder for any single anti-EU government to unwind. As Washington reduces relations to short-lived transactions and Beijing weaponises them, the EU can credibly promise partners something rarer: commitments that outlast any single election or summit. In friendly times, Paris and Berlin should leverage their clout to move Europe in this direction. However, they are also well advised to build broad coalitions inside the EU, so that other European partners can step in if political headwinds change or decision-making is blocked in one of the capitals of the EU's engine.

Authors

Sarah Bressan is Head of Futures and Strategic Foresight at the Global Public Policy Institute (GPPi) in Berlin

Marie Krpata is a Research Fellow at the Study Committee on Franco-German Relations (Cerfa) at the French Institute of International Relations (Ifri) in Paris

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Stiftung Genshagen
Am Schloss 1
D-14974 Genshagen
institut@stiftung-genshagen.de

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Tobias Koepf

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Oliver Gascoigne

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