Munich Security Conference and Europe's Future

by George Friedman - February 16, 2026

Representatives from more than 115 countries gathered over the weekend for the annual Munich Security Conference. Little of substance usually emerges from this meeting, save that it provides a lens for what is foremost in the minds of those who attend. Sometimes, this involves a wide range of issues. Other times, there is only one fundamental issue on the table.

The fundamental issue this year is the shift in how the United States views its place in the world. In a way, this was a crisis meeting. It's not that the world is facing catastrophe; it's that the geopolitical system is profoundly changing, as U.S. Secretary of State Marco Rubio said in his speech, and that many see those changes as an American betrayal.

This is normal for human beings. They live in certain ways and see a change in the realities that shaped those certainties not as merely catastrophic but as villainous. We all have our norms, and we count on them to be permanent guides on how we live our lives. Creating and adjusting to a new norm is painful, so all too often we think of the pain as the result of restless and even wicked forces.

At the meeting in Munich, the fundamental issue is that the global geopolitical system has changed, as have its norms, such that someone must be blamed. Here, Washington is being blamed for betraying the norms of the past and for destabilizing the world, justifying the claim because the president of the United States is Donald Trump, who is in their eyes reckless and unwise. The fact is that the nature of the geopolitical system has changed, and so too has the U.S., which must adjust to new realities as all great powers do.

Certainly, Trump has chosen to dramatically ramp up the tensions surrounding that change – perhaps unnecessarily. But the change is inevitable, and it is natural to feel denial, fear and anger at what appeared to be permanent truths passing into history.

A global shift has global effects, but the region that has been most profoundly shocked is Europe. Having written on this many times before, I apologize for saying again that the Cold War has finally ended, as evidenced by the limits of Russian power in Ukraine. That inevitably changed America's role in the geopolitical system. After World War II, the U.S. built an economic system that facilitated Europe's revival, even as it deployed military force to prevent Soviet incursions. The intent was to allow Europe to recover economically and then be able to defend itself.

The European crisis appears to stem from the perception of a betrayal of the commitments to Europe's defense. The reality is that the Europe of today isn't what it was in 1945. Economically, the European Union's collective gross domestic product is a bit larger than China's. There is no economic reason that Europe cannot protect itself, especially in light of Russia's recent setbacks. Moscow has failed in Ukraine and lost control of the South Caucasus and Central Asia, both of which were in the Soviet (and later, Russian) sphere of influence. This has resulted in a fundamentally different and much weaker geopolitical reality for Russia.

Given this situation, the reasons for U.S. defense guarantees are no longer relevant. The European economy is revived, and the Russian threat has dramatically declined. Economic growth could fuel military development to defend Europe from threats now and in the future.

In other words, the U.S. mission in Europe has been accomplished. Europe is once again wealthy and therefore can field a force that can defend itself against a much diminished threat. Recall that Washington revived Western Europe not as a moral imperative but as a geopolitical necessity. The need is no longer urgent. For the moment and for the immediate future, Europe faces no significant threat, so it has ample time and resources to build and defend itself. By turning a geopolitical relationship into a moral obligation, Europe is, somewhat cynically, trying to convince the U.S. to bear a burden it is capable of bearing on its own.

At issue, too, is that Europe is merely the name we give to a continent containing, depending on how you define it, as many as 50 sovereign nations, each with its own national interests. It's a matter of whether Europe can do what it must do: create a European military under the control of a European state, the funds for which would come from Europe's collective wealth. There is also an important cultural dimension to this debate. On the whole, Europeans are less enthusiastic about military service, which is treated with less honor than it is in the U.S.

It's easier to speak of American betrayal than for Europe to face its obligations to itself. It has long been a region of conflict among nations that want to occupy and destroy each other. It's an open question whether Europe can overcome its savage history, or its disparate interests, enough to defend itself.

This was the fundamental question facing the leaders in Munich: Can Europe evolve from a continent of small, divided and mutually distrustful nations into a global power? From a geopolitical standpoint, this is an imperative. But there is also a moral and historical question to answer. Is Europe doomed to return to its tragic history of division and mutual hostility? Perhaps. But it will not help Europe to blame the U.S. for a perceived betrayal, instead of understanding the new geopolitical reality.

This is what the evolution of geopolitics has generated.

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