

MUNICH SECURITY CONFERENCE

OUR EUROPA AT STRATEGIC BREAKING POINT

AT MSC 2026, AVE EUROPA OPERATED INSIDE THE DECISION SPACE OF EUROPE'S SECURITY ARCHITECTURE.

OUR HEAD OF PR, JOVAN JOVANOVIC, PRESENTED A SECURITY PERCEPTION SURVEY ON STAGE, CO-HOSTED A HIGH-LEVEL ROUNDTABLE WITH EUROPEAN EXPERTS, AND ENGAGED IN DIRECT STRATEGIC EXCHANGES SHAPING THE EUROPEAN SECURITY ARCHITECTURE

TOGETHER WITH MEMBERS FROM THE GERMAN & AUSTRIAN CHAPTERS, OUR DISCOURSE INCLUDED CONVERSATIONS WITH MEPS, COMMISSIONERS, THE LEADERSHIP OF AIRBUS AND VARIOUS STAKEHOLDERS FROM THE BUNDESWEHR, AS WELL AS INFLUENCERS, LIKE GUNTHER FEHLINGER-JAHN (NATO ENLARGEMENT ADVOCACY) AND ANDREAS GRASSL (WORLD POLITICS).

KEY INSIGHTS

DEPENDENCY = STRATEGIC VULNERABILITY

UKRAINE = ACTIVE SECURITY ACTOR, NOT EXTERNAL CASE

WARFARE = INDUSTRIAL, ADAPTIVE, RAPIDLY EVOLVING

A CENTRAL FRACTURE DEFINES EUROPE'S SECURITY LOGIC: PERCEPTION VERSUS REALITY.

EUROPE OPERATES FROM PERCEIVED SAFETY; UKRAINE FROM EXISTENTIAL EXPOSURE. DESPITE STRONG ALIGNMENT ON DEMOCRATIC VALUES AND BROAD SUPPORT FOR NATO INTEGRATION, LIVED REALITY DIVERGES FUNDAMENTALLY.

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SECURITY IS NO LONGER MILITARY-ONLY BUT A TOTAL SYSTEM CONDITION: HEALTH, INDUSTRY, SUPPLY CHAINS, AND INFORMATION RESILIENCE ARE CORE INFRASTRUCTURE.

DEPENDENCY HAS BECOME GEOPOLITICAL VULNERABILITY. UKRAINE FUNCTIONS AS A LIVE OPERATIONAL BATTLEFIELD ENVIRONMENT GENERATING CONTINUOUS SECONDHAND LEARNING FOR EUROPEAN SECURITY DEVELOPMENT.

PERCEPTION GAPS

EUROPE = SECURITY SEEN AS STABILITY

UKRAINE = SECURITY SEEN AS SURVIVAL

INSTITUTIONALLY, EUROPE FACES A STRUCTURAL SPEED DEFICIT. DECISION-MAKING AND PROCUREMENT SYSTEMS REMAIN OPTIMIZED FOR STABILITY, NOT VOLATILITY.

THIS PRODUCES A MISMATCH BETWEEN GEOPOLITICAL REALITY AND INSTITUTIONAL RESPONSE CAPACITY.

CORE CONSTRAINTS

- SLOW DECISION CYCLES
- FRAGMENTED STRATEGIC ACTION
- INSUFFICIENT CRISIS AGILITY

EUROPE REMAINS POLITICALLY FRAGMENTED WHILE THE ENVIRONMENT DEMANDS UNIFIED GEOPOLITICAL BEHAVIOR. THE SYSTEM IS STILL NATIONAL IN STRUCTURE BUT INCREASINGLY COLLECTIVE IN FUNCTION.

OUR CONCLUSION

EUROPE IS MOVING FROM DEPENDENCY TO AUTONOMY, FROM ABSTRACTION TO LIVED SECURITY REALITY, AND FROM FRAGMENTATION TO CONSOLIDATION.

UKRAINE FUNCTIONS AS ACCELERATOR, MIRROR, AND STRESS TEST OF THIS TRANSFORMATION.

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