



FEBRUARY 2026

## From Rupture to Relevance

### Investing in Europe's Southern Partnerships



© Michael Kappeler/dpa via Reuters Connect

Europe is on edge. The so-named [rupture of the world order](#) has both sharpened [doubts about the reliability of the transatlantic partnership](#) and further exposed the risks embedded within it. Yet, while pundits are occupied with the unravelling of Europe's alliance with the United States (US), that partnership's fraying underscores a different, longer-term concern: How the European Union (EU) and its member states are perceived by those beyond the "West"; that is, by its *strategic partners of the next era*?

Africa and the Middle East are integral to Europe's future geopolitical, geo-economic, and security interests; from [trade routes](#), [migration](#)

[and labour](#) dynamics, to [energy transitions](#) and containing [illicit trafficking](#) and regional [conflict spillovers](#). Across the arc to its south, a blocked canal, a politicized border, emboldened extremists or a suspended constitution can mean disrupted supply chains, higher prices and migration surges at home. And the current European stance, characterised by norm promotion and overreliance on an increasingly disruptive US, is strategically untenable.

To become a more independent and credible strategic actor among its southern neighbours, the EU will need to invest more seriously in a clear narrative of what it has to offer, as well as

in its understanding of the political landscapes, interests, and leverage points of these partners, with whom its own future stability is ever more entwined. This requires not only rhetoric but a more prioritized regional policy that aligns EU objectives with partners' political and economic realities. Mismanaging these relationships leaves Europe reacting to – rather than shaping – events in its own strategic hemisphere.

In short, the EU cannot afford to fret too much over old alliances. It must also consider how to build and sustain effective and reliable partnerships in its direct neighbourhood and beyond. Doing so will depend on lessons drawn from the current moment, lessons about projecting more consistent and credible enforcement, navigating transactional security relationships, and dealing constructively with regional autonomy.

### What has actually collapsed?

Misreading this moment risks compounding the disruption rather than correctly countering it. Rather than “[start drinking](#)”, it is essential to critically examine the nature of the change at hand. The US's bellicose musings on ‘taking’ Greenland, provoked a collective gasp of incredulity across Europe.<sup>1</sup> But great powers – including the US, its European allies, and their global rivals – have long treated the selective use of coercion and occasional disregard for international norms and laws as a prerogative of power.<sup>2</sup> What distinguishes recent global power plays is not the novelty of unlawful coercion itself, but the extent to which it is nakedly deployed, with scant effort or impulse to cover it with any legitimizing normative framework.

Yet the norms the EU officially holds dear, including territorial sovereignty, protection of civilians, and respect for human rights and international law, endure. They retain both broad popular adherence, evidenced in widespread civic protests, as well as discernible political support.<sup>3</sup> Moreover, they remain integral to the EU's security interests; consensus on the inviolability of borders has been a pillar of Europe's continental stability for the last 80 years. It is not the norms that have eroded; but rather the credibility of enforcing them.

This credibility depends on sustained great-power endorsement and the willingness of strong states to take risks and incur costs in their defence. The loss of the US as a (selective and imperfect) normative enforcer exposes the same vulnerability for the EU as it has for Ukraine: defending a rules-based order without credible coercive capacity is inherently insecure. This credibility rests upon consistency, demonstrable capability and willingness to bear the costs of independent action in pursuit of stated interests.<sup>4</sup> The EU's struggle to project this coherence has exposed a gap between its normative alignment and strategic assertion.

### Europe's credibility gap and how to address it

What is at stake for the EU is not whether it continues to [profess commitment to a rules-based international order](#), but whether it can convincingly arbitrate among its normative commitments and its strategic interests in practice. This balancing act – shaped both by external pressures and by the EU's own institutional constraints – will increasingly

---

1 It also catalysed some of the first concrete EU measures to resist pressure from the US.

2 Examples include the US invasion of Iraq in 2003, the extension beyond the UN mandate in Libya in 2011 to force regime collapse, Russia's invasion of Ukraine in 2022, or the American and European support for Israel in its war on Gaza and against Iran in June 2025.

3 In the UN General Assembly, the majority of states voted together in favour of many of these principles in cases of [Ukraine](#) and [Gaza](#), and elsewhere. In the EU, the European Commission's *2025 Rule of Law Report* emphasized the importance of Member State follow-up on recommendations in order to access EU funds.

4 The EU's recent naval deployment to protect shipping lanes through the Red Sea shows the promise of the EU acting in a coordinated, interest-driven manner; coercive when necessary, yet bound by a clear mandate.

determine the EU's ability to build and sustain partnerships in its direct neighbourhood, relationships that are central to European interests in security, migration, trade, and energy.

For decades, the EU and its members have been comfortable pursuing their strategic interests in Africa and the Middle East primarily through instruments of soft power: development cooperation, trade, diplomatic convening, and normative rhetoric.<sup>5</sup> This posture allowed European actors to defer (or even obscure) hard trade-offs between interests and values.<sup>6</sup> Meanwhile, the US underwrote an international liberal order with its unmatched military power, reinforcing Europe's privileged position within global institutions. Europe projected influence through normative rhetoric and economic means, while implicitly relying on US coercive capacity.

This arrangement, still reflected in relatively new policies,<sup>7</sup> always had shortcomings, not least in cementing the EU's secondary role to the US and constraining its ability to act autonomously. As interest-driven coercion becomes more explicit, and US actions increasingly threaten the EU's stated principles (to say nothing of its territorial integrity), this strategy has lost its viability. Initially tepid European responses to openly imperial US actions, most vividly displayed in Venezuela and then Greenland, exposed both limited coercive capacities and [constrained political will](#) to uphold its proclaimed norms. Absent course correction, the EU risks being boxed into a set of unsatisfying positions: shadowing the American

model of unapologetically interest-driven coercion; clinging to norm-heavy rhetoric that lacks credible enforcement; or camouflaging strategic interests in principled language that convinces neither external partners nor domestic constituencies.

However, momentum appears to be shifting as Europe awakens to the leverage it can wield as a bloc: signalling its readiness to suspend elements of its hard-won trade agreement with Washington and deploy the Anti-Coercion Instrument, collectively committing unprecedented resources to Ukraine's defence, and swiftly deploying military envoys to Greenland. Soft power remains relevant, but Europe is learning that its effectiveness is conditioned upon credible enforcement capacity, something it has been reluctant to fully acknowledge, let alone invest in.

At the same time, coercive credibility is not enough. The EU must develop and demonstrate its ability to manage tensions between its principles and strategic interests more consistently and transparently, especially in [transactional security relationships](#). This means cultivating a deeper understanding of its neighbours' politics and interests, committing to diverse coalition building, and acting as an independent economic and security player, while rejecting a culture of domination or hectoring.

Transactionalism may be unavoidable in the current environment, though it is never politically neutral. Military assistance, intelligence sharing, or coercive pressure always carries a narrative about whose security is prioritized, which rules will be bent, and who gets to decide. These realities shape norms, expectations and power relations. Europe's challenge, then, is not to avoid these dynamics, but to [engage in them honestly and deliberately](#) – acknowledging trade-offs, managing their legitimizing costs, and protecting its standing as a reliable partner in an increasingly unforgiving strategic environment.

---

5 In notable exceptions, for example France's Sahel operations, military engagement was insufficiently matched with the sustained political and diplomatic investment needed to retain host-country consent and legitimacy.

6 In the case of Gaza, for example, European leaders deflected responsibility by referring to their lack of influence and their dedication to the two-state solution, while continuing their collaboration with Israel.

7 The [Pact for the Mediterranean](#), a relatively new initiative guiding relations in the Southern Neighbourhood, seems more like the continuation of this mindset than an indication of shifting strategies.

## Agency, ambiguity, and the danger of misreading autonomy

The decisions the EU takes during this moment of reordering will shape how potential partner states assess its credibility, reliability, and whether they see an opportunity to partner with the EU in navigating an increasingly rapacious international environment. In regions where the use of force, proxy engagement, and transactional security arrangements are already familiar – from Gulf state security guarantees to countering jihad in the Sahel – states are unlikely to respond to uncertainty by ardently choosing sides. Small and middle-sized states reduce their vulnerability through partner diversification, strategic ambiguity and calibrated policies that place a premium not on alignment, but on agency and autonomy. In this context, Europe will need to be both more politically savvy and more pragmatic in identifying where partnerships can be forged through mutual strategic interests – such as trade corridors, countering violent extremism and providing green energy – while still defending core normative principles.

Recent geopolitical narratives in the US and EU cast world affairs as dominated by either [spheres-of-influence politics](#) or normative bipolarity, pitting [democracies against authoritarian regimes](#). Both narratives presume strict alignment from partners and neighbours, interpreting autonomy as disloyalty, hedging as betrayal, and non-alignment as a threat. This has never represented a desired, let alone realistic, order for many states outside Europe,<sup>8</sup> which all too often found themselves instrumentalized for norm promotion or as arenas to export great power confrontations, particularly with Russia and China.

As the world order grows more multipolar, demanding strict alignment from others becomes a self-defeating strategy. So does

overemphasising the restoration of the previous, West-centric rules-based order, which reproduced European structural power at the expense of others.

Here, the EU's challenge is also an opportunity. Positioning itself as a partner that tolerates, even models, multi-alignment, and supports the emergence of a more balanced rules-based order the EU could gain a comparative advantage. In this way, the EU would not only foster partnerships more suitable for [the current geopolitical environment](#), but could also reinvent multilateralism in a more inclusive and strategic way. This requires a mindset shift as well as investment in EU strategic instruments, both 'hard' and 'soft'. As a collection of states of all sizes and diverse interests, the EU can and should strive for a world order that appreciates geo-economic and political diversity, respects autonomy and independence.

## A more credible role for Europe

Europe needs to attend to the regional theatres directly pertinent to its own physical and economic security. Its relevance to the partners it will need in Africa and the Middle East will hinge less on rhetorical norm defence and more on how it shows itself as a credible enforcer while maintaining its principles consistently and avoiding misreading regional autonomy as disloyalty. In short, the EU will be assessed less through stated principles than through demonstrated choices taken on the long term.

This moment is uncomfortable, but it can also be formative. If Europe wishes to emerge as a credible defender of the values it upholds, while preserving its strategic interests, it will need to rely more squarely on itself in its global pursuits, both strategic and normative. That requires greater independence from the US, as well as more consistency and honesty about when trade-offs must be weighed. It also requires extending to others the autonomy the EU seeks for itself it, recognizing that [multi-alignment](#) and partner diversification are rational responses to a competitive multipolar world.

---

8 The rise of the BRICS and the long-standing UN coalition of the Non-Aligned Movement, or the perseverance of multi-alignment as a foreign policy practice are prominent examples of states actively pursuing non-alignment, strategic autonomy, and transactional cooperation.

## Clingendael Alert

If the EU can make this shift, it could project itself as a different kind of partner: one with a large and integrated market, technological and regulatory capacity, growing security capabilities and a clear repudiation of imperial

ambition. By matching its principles with enforcement and its interests with respect for others' autonomy, the EU may discover its greatest asset is not nostalgia for the old-world order, but the credibility to shape a new one.

### About the Clingendael Institute

Clingendael – the Netherlands Institute of International Relations – is a leading think tank and academy on international affairs. Through our analyses, training and public debate we aim to inspire and equip governments, businesses, and civil society in order to contribute to a secure, sustainable and just world.

[www.clingendael.org](http://www.clingendael.org)  
[info@clingendael.org](mailto:info@clingendael.org)  
+31 70 324 53 84

 @clingendaelorg  
 The Clingendael Institute  
 The Clingendael Institute  
 clingendael\_institute  
 Clingendael Institute  
 Newsletter

### About the authors

**Megan Price** is a Senior Research Fellow and the Head of the Conflict Research Unit. She specialises in security and rule of law programming in conflict-affected settings, and monitors developments on Dutch and European stability programming in Africa and the Middle East.

**Mate Szalai**, PhD is a Research Fellow at the Conflict Research Unit of Clingendael. As a member of the Middle East group, he specialises in the international relations and the domestic political economic systems of the broader Gulf region.