

Collaborative Innovation Center of South China Sea Studies, Nanjing University  
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# From Davos to Munich: Maritime Security Anxiety and Strategic Adjustment Amid the Fragmentation of the Global Order

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# Executive Summary

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In early 2026, the World Economic Forum in Davos and the Munich Security Conference jointly signaled an accelerating outward manifestation of the "fracturing" of the international order. Under Trump 2.0, the United States has more openly returned to power politics and unilateralism, unsettling allies with the perception that the liberal international order may be ending at America's own hand.

Europe, facing the prolonged Russia–Ukraine conflict, rising uncertainty about U.S. commitments, and an intensified narrative of competition with China, has increasingly embraced the judgment that it is "returning to an era of power politics." In response, it is seeking greater strategic autonomy through enhanced defense spending and industrial capacity-building.

At the transatlantic level, although divergences between the United States and Europe are growing, both sides are attempting to preserve alliance cohesion through processes of "repair, recalibration, and re-regulation." At the same time, strategic competition is shifting more systematically toward structural domains such as technology, resources, industry, and trade.

These adjustments are likely to spill over into the maritime domain through expanded naval power projection, intensified competition over rule interpretation, and the securitization of key sea lanes and chokepoints. This dynamic may increase the risk of organized and prolonged friction in surrounding waters, while also creating opportunities for China to stabilize its periphery by providing public goods and institutional supply.

## › Key Points

- Major powers are transforming "order anxiety" into systemic strategic adjustments, entering a new round of structural reshaping.

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- Transatlantic relations display a dual trend of "growing fissures alongside strengthened repair," with the underlying objective of preserving alliance organizational capacity and interpretative authority over rules.
  - Europe operates under a "dual logic": it cannot detach from the United States, yet it must strengthen "European power." Defense and military-industrial capacity building will therefore continue.
  - U.S. competition with China is increasingly concentrated in comprehensive national power domains—technology, resources, industry, and trade—while maintaining necessary communication channels to reduce risks of uncontrolled escalation.
  - The maritime domain will become a convergence point of "power, rules, and sea lanes," with ports, shipping, subsea cables, and seabed resources more likely to be securitized.

### › Policy Implications

- More organized external maritime activity: Extra-regional powers may increase the frequency of joint patrols, military exercises, and capacity-building initiatives, transforming friction from isolated incidents into institutionalized pressure.
- Escalation from rule competition to competition over interpretative authority: International law and institutional reform narratives may be used to constrain rivals' policy space, heightening the risk of fragmented regional governance.
- Stronger linkage between industry, resources, and sea lanes: Technological competition and industrial policy will increasingly spill over into port logistics, maritime insurance, subsea cables, and offshore energy routes, accelerating the securitization of development agendas.

# Introduction

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The year 2026 is emerging as a landmark moment in the evolution of global politics. At the outset of the year, Canadian Prime Minister Mark Carney posed a widely discussed question at the World Economic Forum in Davos on January 23—what has since been termed the "Carney Question": With the advent of Trump 2.0 and the United States adopting a policy orientation characterized by a "new Monroe Doctrine," is Washington accelerating the deconstruction of the post-World War II global order? Will the future international system return to an institutional framework centered on global governance and international rules, or will it slide back toward a form of power politics grounded in relative strength and hierarchy? This question not only reflects deep-seated anxieties within the West but also signals a broader recognition that the global order has entered a phase of structural transition.

On February 13, the 62nd Munich Security Conference convened as scheduled. In his opening address, German Chancellor Friedrich Merz stated bluntly that the international order based on rights and rules, even at its height, was imperfect—but that today it has effectively "ceased to exist." This remark symbolized a public acknowledgment by Europe's mainstream political elites of the structural transformation underway in the international system. The overall atmosphere in Munich was no longer confined to lamenting the fractures of the order; instead, discussions increasingly focused on how to recalibrate strategic positioning and policy pathways amid rising uncertainty.

During the conference, intensive exchanges among political leaders, defense officials, think tanks, and business representatives from Europe and the United States underscored a shared consensus: the international system is undergoing its most profound structural adjustment in nearly 81 years since the end of World War II. The notion of "changes unseen in a century" is no longer merely a conceptual judgment—it is materializing as a concrete process of alliance recalibration, power redistribution, and rule-system restructuring. Notably, the so-called "Munich logic" is not simply an expression of anxiety; rather, it reflects an effort to drive proactive strategic and policy adjustments in response to a fractured order, with the aim of ushering global governance and international rules into a new cycle of stability. Yet this rebalancing process remains at an early stage, and both its trajectory and outcomes remain highly uncertain.

Against this backdrop, examining this round of global order reconstruction from the perspective of maritime security and development—and identifying its spillover effects on

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power projection, rule competition, and the securitization of key sea lanes—has become an urgent and essential analytical task.

## Recalibrating the Transatlantic Relationship: Repairing Fissures While Mobilizing Externally

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The transatlantic relationship is currently under multiple strains, including tensions over Greenland, the protracted Russia–Ukraine war, and trade and tariff frictions. Yet rather than allowing these fissures to widen, the United States and Europe used the 2026 Munich Security Conference to advance a process of "repair, recalibration, and re-regulation," aiming to stabilize alliance cohesion and restore political trust. Secretary Rubio's keynote address was central to this recalibration. Its purpose was not merely to reassure Europe about the sharp policy shifts under Trump 2.0, but to persuade European political and societal elites to accept the alliance logic of "Trumpism"—prioritizing interests, sharing costs, and strengthening external mobilization. Unlike Vice President Vance's 2025 remarks, which attributed European risks to "internal problems" and triggered backlash, Washington this time emphasized narrative reset and expectation management. The goal was to reduce allied anxiety over American unilateralism and to bring Europe back onto a shared strategic trajectory.

Three clearer shifts have emerged in U.S. mobilization narratives. First, the alliance is being reframed from a "community of values" to a "community of power," emphasizing that critical goods for daily life and production must not depend on others, and that transatlantic security and prosperity must rest on internal strength and control over international resource allocation. Second, international institutional reform has been incorporated into the competitive toolkit. Calls to reform postwar institutions, including the United Nations, are substantively aimed at contesting interpretative authority and agenda-setting power within global governance. Third, a narrative of "revival" is being deployed to justify the costs of external competition—providing political mobilization support for technology wars, trade wars, and industrial competition—and urging Europe to join the United States in "making greatness again." Collectively, these shifts point toward a strategic objective: encouraging Europe to more systematically align with the United States in rebuilding advantages across power, technology, industry, and finance.

On China policy, Rubio adopted a relatively restrained tone. He stressed that refusing

dialogue with China would be irresponsible, that cooperation remains possible where interests align, and that communication channels must be maintained to prevent unnecessary conflict. At the same time, he made clear that long-term competition with China will center on comprehensive national power domains such as technology, resources, industry, and trade. This dual posture—dialogue alongside structural competition—suggests that U.S.–China relations are likely to evolve into a pattern of "high contact, low trust": more frequent engagement and friction, but with both sides seeking to manage escalation.

From a maritime perspective, this recalibration will further embed structural competition into the ocean domain. Ports and shipping networks, subsea cables and marine data chains, key maritime chokepoints, and seabed resources are increasingly likely to be integrated into a unified framework of alliance-based industrial policy and securitized rule narratives. The ocean is no longer merely a space for military presence; it is becoming foundational infrastructure for comprehensive national power competition and a frontline arena for contesting interpretative authority over rules.

## **Europe's Strategic Choice: Strengthening "European Power" While Rebalancing Dependence on the United States**

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At the Munich venue, Europe's mainstream political elites displayed a more convergent strategic judgment: Europe cannot do without the United States in security terms, yet it must reduce its vulnerability to American unpredictability. It can no longer fully outsource its security to Washington, but must instead systematically enhance its own defense, military-industrial, and broader industrial capacities. This assessment was articulated most clearly in German Chancellor Friedrich Merz's opening address. On the one hand, he emphasized the long-term nature of the Russian threat to Europe; on the other, he identified China as a key variable in reshaping the international order through "strategic patience" and by leveraging global dependence to redefine patterns of interdependence. He therefore argued that Europe must "return from its holiday from history" and confront anew the realities of power politics and great-power competition.

The policy implication of this combined narrative is that Europe is pushing "strategic autonomy" beyond rhetoric toward a hard agenda of resource allocation and capability

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building. Its legitimacy is grounded in a dual threat perception: in the short term, the Russia–Ukraine conflict as a source of direct security pressure; in the long term, the narrative of competition with China as a structural mobilizing framework. The immediate effect is to expand the political space for rising defense expenditures, revitalizing military-industrial production, and upgrading key weapons systems. By noting that Europe's GDP far exceeds Russia's while its power does not necessarily correspond proportionally, Merz underscored that Europe must adapt to a new era of great-power politics and fully unleash its economic, technological, and military potential. In effect, "building European power" is being defined as a long-term project of national and regional capacity construction.

However, the 2026 Munich conference also revealed structural tensions within Europe. On security issues, there is greater convergence; on economic policy and relations with China, divergence remains evident. On one hand, EU foreign policy chief Kaja Kallas publicly criticized the Trump administration's approach to mediating the Ukraine war and stressed that Europe would not compromise on Russian territorial claims—highlighting both a firmer European stance on Ukraine and more visible policy differences with Washington. On the other hand, the Merz government continues to stress the importance of economic cooperation with China, explicitly describing China as both a "strategic competitor" and a "strategic partner." This reflects Europe's effort to preserve policy flexibility under the influence of industrial and market interests.

In terms of spillover effects, once Europe's "power-building" enters a trajectory of military-industrial revival and enhanced alliance coordination, it will no longer remain a matter of internal budgets and procurement. Instead, it will more directly project outward, particularly through demonstrations of maritime presence and the securitization of key sea lanes. British Prime Minister Keir Starmer described Europe as a "sleeping lion," emphasizing the continent's vast potential in military-industrial production and naval and air capabilities. Such statements, resonating with Merz's agenda, suggest that institutionalized trends in defense cooperation, capability enhancement, and joint operations will strengthen in the years ahead.

If this trajectory overlaps with frameworks advanced by allies such as Japan—emphasizing the global security responsibilities of alliances—Europe's defense agenda may increasingly extend outward through joint exercises, maritime deployments, and capacity-building initiatives, rendering extra-regional maritime activities more organized and systematic.

For China, responding to Europe's growing "security convergence" should not hinge on entering into narrative confrontation. Rather, the priority lies in stabilizing Europe's "economic differentiation"—its rational interest in cooperation. First, dialogue with Europe

should be anchored more firmly in public goods agendas, including climate governance, maritime decarbonization, marine environmental protection, ocean science research, and maritime public security, with deliverable projects and annual cooperation lists. Second, technical cooperation and third-party platform coordination should be strengthened in maritime rules and standards to reduce Europe's inertia toward a singular securitized narrative. Third, China should conduct forward-looking assessments and maintain institutionalized communication mechanisms regarding potential increases in European maritime presence and joint operations, so as to avoid miscalculation and compounded risks amid more frequent encounters at sea.

## **Power Distribution and Rules-based Order: Unipolar Imbalance, Double Standards and Accelerated Multipolarization**

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The accelerating sense of "fracture" in the international order stems less from ideological divergence than from the prolonged imbalance in global power distribution since the end of the Cold War and the lack of effective counterbalancing mechanisms. The policy orientation under Trump 2.0 does not represent a revolutionary reconstruction of the existing system; rather, it reflects a more direct and less concealed use of U.S. advantages within a unipolar structural framework. The United States possesses clear comprehensive power superiority, reinforced by institutionalized security commitments and dependencies across Europe and Eurasia. This has produced a structural environment in which power is highly concentrated while constraints remain relatively weak. In such a context, even when policies provoke external controversy or countermeasures, U.S. decision-makers may still believe that their advantages are sufficient to absorb the costs, thereby reducing incentives for coordination and compromise.

Under these structural conditions, rules and values are more readily instrumentalized. Trends toward assertive nationalism, expansive security policies, and resource prioritization reflect a strategic logic centered on "power and national interests first." Liberal values increasingly function as tools of mobilization and pressure rather than universally applied constraints. The narrative opposition between a "rules-based order" and an "order based on strength" has not diminished with policy transitions; instead, it has been reinforced through unilateralist and protectionist practices, making the selective application of rules more

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visible.

The erosion of order legitimacy through double standards has become a significant driver of accelerating multipolarity. When those claiming to uphold human rights and international law adopt selective positions on key issues—or employ institutional mechanisms to shield allies from accountability—the credibility of the "rules-based order" is inevitably weakened. These controversies are no longer confined to external criticism; they have generated internal divisions and open debate within the West itself. Meanwhile, the policy orientation labeled "new Monroeism" signals a clearer return to traditional power politics, characterized by more explicit and instrumental approaches. This, in turn, strengthens global perceptions that multipolarity is advancing at an accelerated pace.

In the maritime domain, the loss of rule legitimacy generates cascading effects. International law and the law of the sea are increasingly subject to selective interpretation and embedded within political mobilization. Disputes over freedom of navigation, conflict resolution mechanisms, and the legality of law enforcement actions are more likely to evolve into contests over interpretative authority. As the authority of multilateral mechanisms declines, regional cooperation becomes more reliant on minilateral or ad hoc arrangements, increasing the risk of governance fragmentation. Middle powers may enjoy greater room for strategic balancing, but under alliance mobilization pressures and securitized narratives, they also face heightened risks of alignment pressures—thereby increasing uncertainty and friction in surrounding waters.

Overall, the combined effects of power imbalance and declining rule legitimacy are pushing the international order into a new phase characterized by more institutionalized competition and more normalized friction. For China, maritime responses must place greater emphasis on the capacity to supply rules and evidence, on technical crisis-management mechanisms, and on stabilizing policy rationality among neighboring states through development cooperation in order to mitigate structural pressures.

## **Spillover Effects from the Perspective of Maritime Security and Development**

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Once the order anxiety reflected at Davos and Munich enters the maritime domain, it tends to translate into concrete policy and operational arrangements. Naval presence, rule narratives, and control over key sea lanes and infrastructure are becoming increasingly intertwined, transforming the ocean from a traditional military theater into a central

platform for comprehensive national power competition.

First, extra-regional maritime activities are becoming more institutionalized and sustained. Joint patrols, exercises, and capacity-building initiatives are no longer occasional demonstrations but are embedded within mechanism-based arrangements, often framed in terms of "defending rules" or "ensuring passage security." Over time, such sustained activity can influence regional states' risk assessments and policy choices. For China, the principal pressure lies not in isolated military actions but in the gradual integration of regional countries into established systems through training, equipment cooperation, and law enforcement coordination—leading them to act within externally defined operational frameworks at critical moments.

Second, competition over maritime issues increasingly centers on rule interpretation and narrative construction. Institutional reform and rule restatement are frequently invoked, and legal interpretations and moral framing in specific incidents are becoming more politicized. Without stable and credible presentation of facts and legal reasoning, opposing narratives can easily become entrenched as default positions in international public opinion. Therefore, the consistent provision of clear, verifiable, and coherent legal and factual foundations has become essential for preserving policy space in maritime affairs.

Third, critical infrastructure—ports, shipping networks, subsea cables, marine data systems, and energy transport routes—is increasingly incorporated into security agendas. Through mechanisms such as investment screening, financing and insurance terms, access standards, and data governance rules, external powers can impose institutional constraints on these channels. Meanwhile, law enforcement actions, intelligence operations, and public opinion campaigns often intersect in the same maritime areas, producing gray-zone friction that falls below the threshold of war yet steadily consumes response resources.

At a deeper level, maritime competition is expanding from displays of military power to institutional standards and compliance systems. Port governance frameworks, shipping compliance rules, subsea cable maintenance standards, marine environmental regulations, and maritime safety norms all influence regional states' policy orientations. Even countries attempting to maintain strategic balance may gradually develop path dependence through standard adoption and capacity-building processes, thereby becoming embedded within institutional networks that shape their practical choices.

In such an environment, risks in surrounding waters are more likely to manifest as frequent and sustained friction rather than single large-scale confrontations. Most incidents may not escalate into military conflict, but cumulative effects can alter the broader atmosphere of regional security and development. Consequently, response strategies should prioritize upstream shaping—stabilizing cooperation foundations, strengthening

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communication mechanisms, and enhancing infrastructure resilience—to reduce miscalculation space and maintain maritime development stability amid rising uncertainty.

## Conclusion

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From the "Carney Question" in Davos to the open declaration in Munich that the "rules-based order no longer exists," early 2026 reflects not a transient emotional fluctuation but a systemic recalibration centered on power structures, institutional arrangements, and strategic positioning. Under Trump 2.0, the United States has more openly returned to power politics and instrumentalized institutions; Europe is seeking a new balance between security dependence and strategic autonomy; and the imbalance of the unipolar structure, coupled with rule double standards, is accelerating the momentum toward multipolarity. Together, these shifts are reshaping the operational logic of the international system.

In this process, the maritime domain has become a frontline arena where spillover effects are most concentrated and concrete. Power projection is increasingly organized, rule competition is shifting toward contests over interpretative authority and evidence chains, and the securitization of key sea lanes and infrastructure is intensifying—producing a structural pattern of "low intensity, high frequency, and long duration" maritime friction. The ocean is no longer merely a geographic space for military presence but a foundational platform for comprehensive national power competition, institutional embedding, and development agenda contestation.

Facing this trajectory, China's strategic response should not be confined to incident-based reactions but should focus on structural shaping. On one hand, by continuously providing maritime public goods and deliverable cooperation projects, China can stabilize neighboring states' interest expectations and prevent regional agendas from being dominated by a singular securitized narrative. On the other hand, by improving crisis management mechanisms and rule-interpretation capacity—strengthening both evidence chains and communication chains—China can maintain initiative in rule competition. Simultaneously, enhancing the resilience of ports, shipping networks, subsea cables, and offshore energy routes can transform development security into strategic buffering space.

The rebalancing of the global order remains in its early stages, with direction and pace still uncertain. What is certain, however, is that maritime security and development will become a key intersection of competition and cooperation among major powers. How China preserves bottom lines, sustains cooperation, and secures structural initiative during this period of order

reconstruction will shape its strategic space and long-term position in the evolving global landscape.

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## › Collaborative Innovation Center of South China Sea Studies, Nanjing University

Founded in July 2012, the Center was initiated by Nanjing University and has been greatly supported by three governmental departments: Ministry of Foreign Affairs of China, the People's Government of Hainan Province, and the State Oceanic Administration. The Center mainly conducts multidisciplinary collaborative innovation, following the mode of "arts and sciences-army and local-universities and institutes-school and school collaboration". The Collaborative Innovation Center of South China Sea Studies promotes comprehensive research on the South China Sea and serves for the national strategic decisions on the South China Sea.

## › Maritime Security and Development Policy Report

The series of Maritime Security and Development Policy Reports of the Collaborative Innovation Center of South China Sea Studies was launched in June 2022, aiming to become the most authoritative and world-class think-tank policy research report on maritime issues in China. This series of reports will be featured as authoritative, dynamic and forward-looking, providing in-depth analysis and countermeasure suggestions on maritime strategy, security, legal and development issues that have a significant impact on China. The report will be open to scholars from academic institutions and well-known think tanks both at home and abroad.

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