Issue Brief

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One Ocean, Many Currents: China's Norm-Shaping Campaign at Sea and Europe's Fragmented Response

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Europe's maritime disputes and cooperation with China are usually analyzed one sea at a time. Simply put, the South China Sea is a question of security and law, the Gulf and Red Sea chokepoints are problems of energy and navigation, the Arctic is a matter of science and shipping, and the high seas are a matter of biodiversity. This issue brief argues that the four theaters are better read as a single Chinese campaign for authority over the rules of the ocean, that is, durable access to, and influence within, the institutions that write and operationalize maritime governance, combined with a refusal to be bound by the rules Beijing dislikes. The same pattern and interests recur across the BBNJ High Seas Treaty, the International Seabed Authority, the Antarctic Commission, the maritime chokepoints, and the Arctic. Where Beijing runs one campaign, Brussels runs four separate files, each featuring its own lead service and timeline. The asymmetry is sharpened by American withdrawal from ocean multilateralism, which is pushing the European Union (EU) into tense functional cooperation with China even as bilateral rivalry deepens. Surveying the evidence in each arena, the issue brief identifies where the thesis is most testable and argues that Europe's central task is administrative; it must stop treating one campaign as four files, using a new reinforced European Ocean Pact as the vehicle.

European discussions of EU–China maritime relations almost always proceed theater by theater. The South China Sea (SCS) is filed under security and international law, the Strait of Hormuz and the Red Sea under energy and freedom of navigation, the Arctic under science, environment and shipping governance, and the high seas under biodiversity and the law of the sea. Each file has its own lead service in Brussels, its own vocabulary, its own timeline, and, perhaps most importantly, its own budget. Granted, the Directorate-General for Maritime Affairs and Fisheries (DG MARE) is the lead body for policy and implementation, but there is no single authority for maritime affairs. Instead, a shared EU system manages these issues. The result is an analytical habit that treats Chinese behavior at sea as a set of discrete, theater-specific problems to be managed one at a time.

This issue brief argues that this habit obscures more than it resolves. A more accurate way to read China's conduct across all four arenas is to see it as a single, coherent campaign with one objective: to acquire durable access to, and influence over, the institutions that write and operationalize the rules of the ocean, while declining to be bound by the rules it dislikes. The apparent paradox that frames most conference invitations, and definitely my own, is that the focus is on rivalry in the South China Sea, cooperation in the Arctic, security in the Strait of Hormuz, and so forth.

"Of the four main maritime theaters, the high seas are the least self-evident because they are defined not by a place but by the absence of one. In the vocabulary of the Law of the Sea, they are areas beyond national jurisdiction, meaning the water column and the seabed positioned beyond the 200-nautical-mile exclusive economic zones, beyond the reach of any single state's sovereignty.

This paradox dissolves once one stops asking what China wants in each sea and starts asking what China wants from ocean governance as an integrated system. The answer is the same everywhere; if one looks beyond regional and thematic divergences, the issue is China's standing as a rule-shaper. The corollary for Europe is uncomfortable, or at least complicated. The cooperation European institutions welcome in the low-politics arenas trades in exactly the same currency—normative authority—as the rivalry they resist in the high-politics ones. The Union must accept that, in dealing with these problems, it has acquired a bedfellow it did not expect, namely China. It must therefore prepare to work multilaterally despite the apparent challenges, some of which this brief will address.

The most rigorous test of this thesis became apparent on January 17, 2026, when the High Seas Treaty entered into force.[1] It is worth beginning there because the high seas are the one arena in which the rules are being written right now, in real time. The contest for authorship is therefore visible in its purest, and arguably in its most agitated, form.

The High Seas: Contest for Authorship in Plain Sight

Of the four main maritime theaters, the high seas are the least self-evident because they are defined not by a place but by the absence of one. In the vocabulary of the Law of the Sea, they are areas beyond national jurisdiction, meaning the water column and the seabed positioned beyond the 200-nautical-mile exclusive economic zones, beyond the reach of any single state's sovereignty. They are also, by a wide margin, the largest of the four, covering roughly two-thirds of the ocean's surface and close to half the surface of the planet, while holding the greater part of marine life by volume. Until very recently, they were also the least governed of all, with a thin patchwork of high-seas freedoms under the 1982 Convention and a scatter of sectoral bodies for fishing, shipping, and seabed minerals, but no comprehensive regime for marine biodiversity or protected areas in the open ocean. That combination of immense scale, freedom from national sovereignty, and, until now, limited governance makes the high seas a theater in their own right rather than a backdrop to the others. It also makes the contest over who influences the writing of the first genuine rulebook so consequential.

The Agreement on the Conservation and Sustainable Use of Marine Biological Diversity of Areas Beyond National Jurisdiction, the BBNJ Agreement, or High Seas Treaty, was adopted by consensus in June 2023 after nearly two decades of negotiations. It rests on four interlocking pillars: the sharing of benefits from marine genetic resources through area-based management tools, including marine protected areas; ecological impact assessments; and capacity-building and the transfer of marine technology.[2] When it crossed the threshold of 60 ratifications in September 2025, it entered into force 120 days later. By that date, the agreement counted 82 ratifications among the 145 signatories, leaving almost half of the signatories without ratification.[3]

The European Union had positioned itself as the treaty's political champion, leading the High Ambition Coalition that drove the text toward conclusion. Sixteen member states had ratified by the time it took effect.[4] What is striking is the company the EU keeps, and the company it does not. China and Japan, two of the world's largest distant-water fishing nations, ratified only in December 2025, in the final weeks before the treaty entered into force, a move widely read as an effort to secure a seat at the table where the operational rules would be drafted.[5] The United States signed in 2023, but the U.S. Senate has not ratified it. As of this article's publication, neither

Figure 1. High Seas Treaty (BBNJ): ratification status of major powers, January 2026

Party / entity	Signed	Ratified / party
European Union	Signed	Party
China	Signed	Dec 2025
Japan	Signed	Dec 2025
United States	Signed	No
United Kingdom	Signed	No
Germany	Signed	No
Canada	Signed	No

Treaty entered into force 17 Jan 2026 (82 ratifications, 145 signatories). The EU is a party; under Art. 68(3) only member-state ratifications count toward the 60-state threshold. China and Japan ratified weeks before entry into force. The United States signed in 2023 but the Senate has not ratified.
Sources: High Seas Alliance; European Commission (DG MARE).

have Canada, Germany, nor the United Kingdom (Figure 1).[6] In the single arena where the architecture of ocean governance is actively being built, the EU and China are both on board, while much of the rest of the Western world is still onshore and watching.

China's late ratification was not only a conservation gesture, but also, arguably, a positioning move, and Beijing made the logic explicit almost at once. Having completed its domestic ratification through the Standing Committee of the National People's Congress in late October 2025,[7] China bid to host the treaty's secretariat in Xiamen, competing against Valparaíso and Brussels and promising to house the Clearing-House Mechanism free of charge while also funding the participation of least-developed and small-island states.[8] It is important to realize that the secretariat is not simply a clerical function; it is a useful policy tool for any maritime power seeking to shape how the treaty is implemented. As analysts of the contest have observed, its influence lies in the discretion to operationalize deliberately ambiguous provisions, including decisions about what qualifies as a marine protected area, how benefit-sharing from marine genetic resources is defined, and which proposals for area-based management survive review. Whoever shapes those operational definitions, in effect, shapes the treaty. Both China and the EU would like to control this mechanism.[9] On marine genetic resources in particular, where the agreement creates an entirely new regime for access and benefit-sharing, one leading specialist judges that China is positioned to become the dominant player.[10]

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None of this is sinister in itself; it is simply effective policy. But it should be read alongside China's conduct during the negotiations, where it consistently favored flexible, case-by-case approaches to protected areas, environmental assessment, and dispute settlement. Those positions preserve discretion in precisely the contested waters where China is itself a claimant or has a major interest.[11] The same state that seeks to author the operational rules of the global commons is also the one most determined to keep those rules elastic where they might constrain it and enforce them where it is strong. That contradiction is the thread that runs through every other maritime theater, and it is at its sharpest in the South China Sea.

The South China Sea: rejecting the role of rule-taker

The conventional question about the South China Sea is whether the EU–China difference is fundamentally about security or norms. I maintain that such framing is too binary. The deeper disagreement is over whether China accepts Europe's standing as a norms author in the SCS. China has defined the waters at issue as domestic waters. On July 12, 2016, the Annex VII arbitral tribunal constituted under the UN Convention on the Law of the Sea ruled overwhelmingly for the Philippines, holding that China's claim to historic rights within the so-called nine-dash line had no lawful effect.[12] China declared the award null and void on the day it was issued and has never wavered in that position. On the ninth anniversary in 2025, its foreign ministry further dismissed the ruling as a worthless piece of paper.[13] The European Union and its External Action Service have consistently taken the opposite position, stating that the award is legally binding on the parties and stressing the navigational freedoms and obligations that the Convention establishes under international law.[14] China's counterposition is that the EU has no legal right to interfere and that its policy is politically driven, intended to discredit China rather than address a genuine legal issue.

Europe's leverage in these waters is almost entirely normative: the Convention, the award, and the principle of freedom of navigation. This is precisely the currency Beijing is most determined to devalue. The reason is structural rather than regional. Conceding the binding force of an adverse tribunal ruling in the South China Sea would concede the principle that an external legal order can constrain China at sea. Once admitted, that principle could extend to the Arctic and the high seas. This is why the space to narrow the substantive difference is so restrained. The realistic instrument is compartmentalization: keeping functional channels open without pretending that the underlying gap is closing. The single binding adjudication that could restrict China is the one China rejects outright, even as it bids to host the treaty's secretariat, where the next generation of rules is still being written. That contrast captures the thesis of this issue brief in miniature.

The Seabed and the Southern Ocean

If the South China Sea shows China rejecting a binding rule imposed from outside, two further arenas show the same state shaping and constraining rules from the inside. Both arenas, like the high seas, lie largely beyond national jurisdic-

> ***"In the deep ocean floor, China is not a latecomer but an incumbent leader, and the area has become a central theme in Chinese maritime policy. Through three state-controlled entities, it holds five of the 31 exploration contracts the International Seabed Authority has issued, more than any other sponsoring state, across some 225,000 square kilometers of seabed. China is also the Authority's single largest financial contributor.***

tion. The first is the seabed. Beneath the high-seas water column lies the Area, the deep ocean floor beyond any national continental shelf, which under Part XI of the Convention is the common heritage of humankind and is administered by the International Seabed Authority. The Area covers roughly 54 percent of the world's oceans, and the rulebook meant to govern its exploitation, the Mining Code, is, like the BBNJ, still being written.[15] Here China is not a latecomer but an incumbent leader, and the Area has become a central theme in Chinese maritime policy. Through three state-controlled entities, it holds five of the 31 exploration contracts the Authority has issued, more than any other sponsoring state, across some 225,000 square kilometers of seabed. China is also the Authority's single largest financial contributor.[16]

China's position translates into influence over the rules themselves. Arguably, why should it not? Observers of the negotiations report that Chinese delegates have pressed for contractor-friendly provisions and resisted measures that would impose stronger environmental oversight or empower compliance bodies. At the same time, Beijing has slowed the move from exploration to exploitation, retaining *de facto* control over vast tracts of seabed without triggering the obligations that commercial mining would bring.[17] One ocean-governance specialist who has attended the Authority's meetings for years described the dynamic plainly: when China speaks, others listen and try to accommodate.[18] This is the BBNJ method in another from: shaping operational rules while keeping them elastic where they might bind.

> ***If the South China Sea is where the normative contest is starkest because of the depth of disagreement with China, the Gulf and Red Sea chokepoints are where the asymmetry of effort is clearest. China, the largest single beneficiary of open chokepoints, has run an independent anti-piracy escort mission in the Gulf of Aden since December 2008. The mission has been deliberately kept apart from the U.S.-led Combined Maritime Forces, NATO and the EU.***

The seabed also offers the clearest illustration of how American withdrawal reshapes the contest. The United States has never ratified the Convention and is not a member of the Authority, leaving China as the most powerful, and legitimate, player in the room. In April 2025, Washington went further, issuing an executive order to authorize seabed mining unilaterally, outside the Authority's framework. A U.S.-linked company promptly applied to mine the resource-rich Clarion-Clipperton Zone under a national permit.[19] The U.S. move drew condemnation across the membership. Tellingly, China was among the loudest defenders of the Authority's exclusive jurisdiction, insisting that any activity in the Area proceed only under the Convention in accordance with international law.[20] In the seabed, as on the high seas, the American exit casts Beijing as the apparent custodian of the very multilateral order it is bending to its advantage. It also leaves the European Union on the same side as China against the United States, this time for arguably sound reasons.

The second arena is the Southern Ocean, governed by the Commission for the Conservation of Antarctic Marine Living Resources, a body of the Antarctic Treaty System that, like the Seabed Authority, decides by consensus. For seven consecutive years, a network of three large marine protected areas in East Antarctica, the Weddell Sea, and off the Antarctic Peninsula has been proposed and backed by a clear majority of members, the European Union among them. For seven consecutive years, the proposals have has been blocked by just two states: Russia and China. Both are major krill-harvesting nations, and both have cited insufficient scientific justification, grounds that other members regard as spurious.[21] The forty-fourth Commission meeting, in Hobart in October 2025, ended the same way. In 2024, China also single-handedly blocked enhanced protection for the emperor penguin at a related

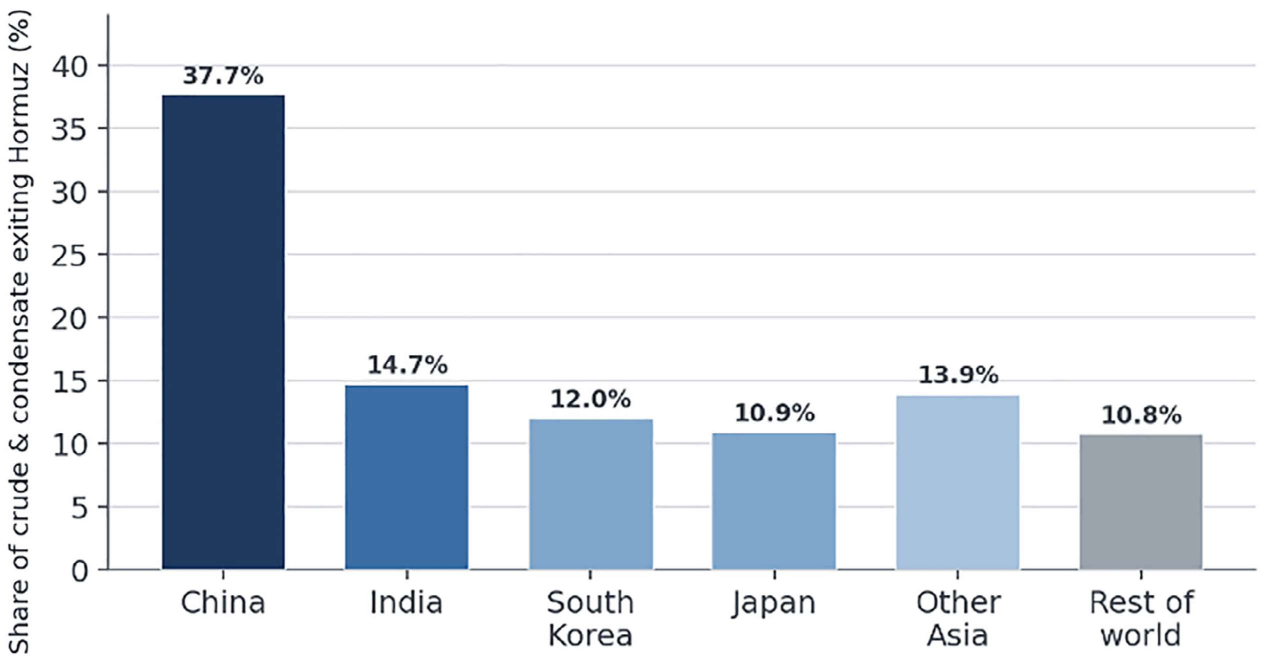
Antarctic forum.[22] As one analysis observed, it is not that China wants to overturn the Antarctic system or kill the penguins. Rather, China is bending that system to its interests through a *de facto* veto over consensus decision-making.[23]

Together the two cases complete the picture of the high-seas theater. At the International Seabed Authority, China shapes a rulebook still being drafted; at the Antarctic Commission, it freezes one that already exists; at the BBNJ, it positions itself to help administer a third. The shared method entails using multilateral procedures themselves—late ratification, secretariat bids, contractor-friendly drafting, consensus vetoes—to keep the rules of the global commons permissive where they might otherwise constrain China. It is no coincidence that the same paralysis grips all three at once. The Mining Code remains unadopted, Antarctic protected areas remain blocked, and even the newly enacted BBNJ enters implementation shadowed by China's insistence on language guaranteeing that the new treaty does not undermine existing instruments. The wording widely read as shielding its positions elsewhere, including in the South China Sea.[24] Consensus, designed as a safeguard against domination by the powerful, has become the instrument through which a single powerful state can stall collective action.

Chokepoints: shared dependence, divergent burden

If the South China Sea is where the normative contest is starkest because of the depth of disagreement with China, the Gulf and Red Sea chokepoints are where the asymmetry of effort is clearest. The EU's commercial relationship with China is overwhelmingly seaborne, and bilateral goods trade reached roughly €732 billion in 2024, making China the EU's second-largest goods partner, with a deficit of some €312 billion that widened

Figure 2. Where Hormuz oil goes: crude & condensate by destination, Q1 2025



Asia takes 89% of crude leaving the strait; China alone takes more than a third. Roughly 20 mb/d — about a quarter of seaborne oil trade — transits Hormuz. Source: US EIA via Vortexa / Visual Capitalist.

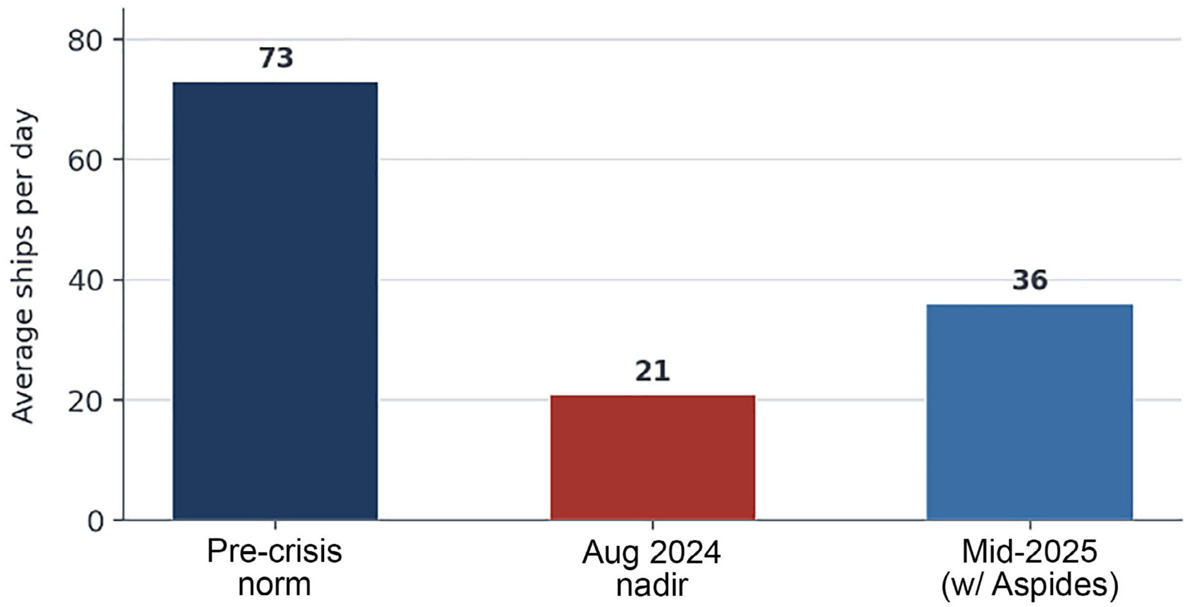
further in 2025 to roughly €360 billion.[25] About half the value, and three-quarters of the weight, of the EU's imports arrive by sea. Inbound containers from China constitute the single largest extra-EU maritime flow, while the Belt and Road rail corridors carry only a low-single-digit share by value.[26] Europe and China, in short, depend on the same narrow waterways, some of which are under dispute. A functional compromise will therefore be necessary alongside, rather than instead, a legal dispute resolution.

EU and China do not, however, share the burden of securing the common waterways. The Strait of Malacca carries roughly a quarter of global maritime trade and around four-fifths of China's crude oil imports, a dependence that Chinese strategists have called the "Malacca dilemma" since 2003. Further west, the Strait of Hormuz handled about 20 million barrels of oil a day in 2024, equivalent to a fifth of global petroleum consumption and more than one-fourth of all seaborne oil trade.[27]

The destination data are the revealing part (Figure 2). China alone takes more than a third of the crude leaving Hormuz, far more than any other state, while Asia as a whole takes nearly nine-tenths.[28] By one independent estimate, something approaching half of China's crude imports and roughly a third of its liquefied natural gas pass through that single strait.[29] The U.S. and Israeli attack on Iran in 2026 shut down the Hormuz Strait completely. Despite Chinese efforts to handle the shutdown bilaterally, the costs have been enormous for all trading partners, but arguably worst for Asia.

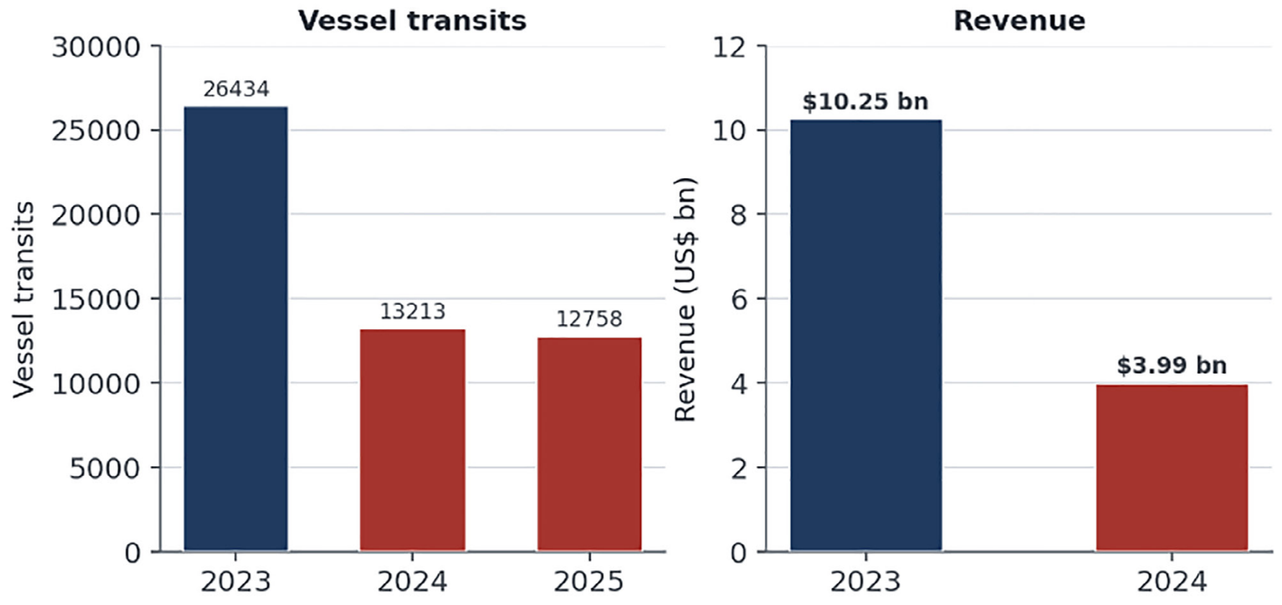
When the Red Sea burst into chaos in 2024, the contrast in response was instructive. The European Union established a defensive naval mission, EUNAVFOR ASPIDES, launched on February 19, 2024 to protect merchant shipping against Houthi attacks across the Bab-el-Mandeb, the Red Sea, the Gulf of Aden and the approaches to Hormuz, operating under the authority of UN

Figure 3. Red Sea daily transits: collapse and partial recovery



EUNAVFOR Aspides (launched Feb 2024) escorted 476 snips and downed 18 drones by mid-2025, daily traffic recovered ~60% off the nadir but stayed well below normal. Source: Cdr V. Gryparis, Reuters, Jun 2025.

Figure 4. The Suez collapse: Red Sea diversion guts canal traffic, 2023–2025



Transits fell roughly half and revenue 61% in 2024 as carriers rerouted around the Cape of Good Hope.
Source: Suez Canal Authority (Chairman O. Rabie, Apr 2025).

Security Council Resolution 2722.[30] The Council has since extended the mandate to early 2027,[31] and by mid-2025 the mission had closely escorted some 476 vessels, shot down 18 drones, intercepted four ballistic missiles and destroyed two remote-controlled boats. Average daily transits had recovered by around 60 percent from their 2024 nadir, though they remained well below the pre-crisis norm (Figure 3).[32]

The disruption those figures imply was historically high. Transits through the Suez Canal fell by roughly half in 2024, from a record of more than 26,000 vessels in 2023 to about 13,000, and canal revenue dropped by some 61 percent as carriers rerouted around the Cape of Good Hope (Figure 4).[33] The International Monetary Fund recorded Suez trade volumes down about half year-on-year in early 2024 even as Cape traffic surged. UNCTAD found canal tonnage cut by around 70 percent by mid-year, while Egypt put its lost revenue at roughly USD 7 billion.[34]

China, the largest single beneficiary of open chokepoints, did not join ASPIDES. Instead, it has run an organizationally independent anti-piracy escort mission in the Gulf of Aden since December 2008, now well past its 46th task force. The mission has been deliberately kept apart from the U.S.-led Combined Maritime Forces, NATO and the EU.[35] During the Houthi campaign, Beijing relied on its relationship with Tehran to seek separate assurances of safe passage for Chinese-linked vessels rather than participating in collective defense. Chinese warships were also documented declining to assist ships under fire.[36] The pattern is consistent with the argument in this paper. China wants the governance seat and the security assistance without the coalition discipline or the burden. What looks like cooperation at the chokepoints is, in fact, shared consumption of an order that others are left to provide—an order that China simultaneously works to delegitimize. This is the core of the problem. The EU and China would need to find a more reliable structure for cooperation with a more equitable approach to burden-sharing.

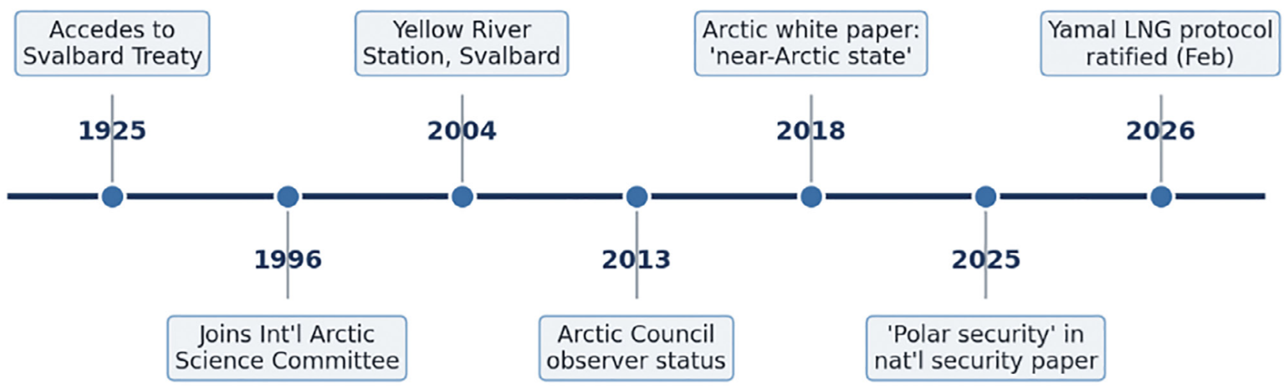
The Arctic: entrenchment mistaken for a firewall

The Arctic is the arena Europe most wants to treat as a firewall against rivalry, a space where shared interests in science, environmental protection, and shipping governance can survive the broader chill. The aspiration is reasonable, but it rests on a misreading of how China has built its Arctic position.[37] That position rests not on territory but on accumulated rights and memberships. It is the signature of a strategy aimed at securing access to governance rather than controlling geography.

The Chinese footholds were laid down over the course of a century (Figure 5). China acceded to the Svalbard Treaty as long ago as 1925, joined the International Arctic Science Committee in 1996, opened its Yellow River research station on Svalbard in 2004, and obtained observer status at the Arctic Council in 2013.[38] In 2017, it folded the region into the Belt and Road as the "Polar Silk Road." In its 2018 Arctic white paper, it declared itself a "near-Arctic state."[39] By 2025, "polar security" had been written into China's national-security doctrine, a development the European Parliament noted with concern.[40] Observer status confers no vote and must be renewed every four years by unanimity of the eight Arctic states. It is a seat at the table rather than a hand on the wheel, but with increasing political and economic influence, is exactly the kind of standing this strategy is designed to accumulate.

What converts that standing into leverage is the collapse of the alternative. After Russia's full-scale invasion of Ukraine in February 2022, the seven other Arctic Council members paused all participation. The forum that had governed the region by consensus fell into *de facto* paralysis, and only a portion of its working-group projects later re-

Figure 5. China's Arctic institutional entrenchment, 1925–2026



China holds rights and memberships rather than territory: a treaty foothold, scientific bodies, a research station, observer status, and — after 2022 — deepening bilateral dependence on a sanctioned Russia. Sources: China's Arctic Policy (2018); The Arctic Institute; EP A10-0229/2025. (Nodes evenly spaced.)

sumed, largely on a virtual basis.[41] China declined to recognize an Arctic Council without Russia, and analysts have been blunt that the resulting governance vacuum is one Beijing is well placed to exploit. It can entrench itself economically, scientifically, and politically while advancing alternative governance models.[42] The Sino-Russian partnership reached new heights in February 2026, when Russia ratified a protocol deepening Chinese involvement in the Yamal liquefied-natural-gas project, lifting Chinese entities to roughly 30 percent of the venture. The move was timed, transparently, against the EU's planned phase-out of Russian gas.[43] Sanctions intended to isolate Moscow have instead delivered it into a tighter embrace with Beijing in precisely the Arctic energy domain Europe treats as low politics.

The commercial artery of this relationship, the Northern Sea Route, illustrates both the momentum and its limits. Cargo volumes reached a record of nearly 38 million tons in 2024, less than half the 80-million-ton target the Kremlin had set for that year (Figure 6). The traffic is now almost exclusively between Russia and China, including a Chinese-launched container line and, in October 2025, the first direct container transit from China to Europe by the Arctic route.[44] The reading of the situation should be one of entrenchment with setbacks, rather than uninterrupted advance. Independent assessments find that the Polar Silk Road has slowed since 2022. Chinese port ambitions in the Nordic countries and Greenland have been repeatedly blocked, prompting Beijing to redirect its energies toward its one welcoming partner and toward institutions where its observer and treaty status give it durable, low-cost access.[45] The point is not that this is an invasion of the High North. It is a patient process of institutional entrenchment through the scientific and environmental channels that Europe keeps mislabeling as harmless, or at a minimum as not securitized enough. It is clear that dual-use, in the Arctic, is a governance problem before it is a technology problem. It must therefore be treated as such, in the same manner as the Red Sea, or any other securitized theater.

The clearest evidence that this is a governance problem rather than a technological one sits just south of the Arctic, in the Baltic. Since 2023, a string of subsea cables and pipelines there have been severed by ships dragging their anchors across the seabed. The Balticconnector gas pipeline and two cables were damaged by the Chinese-operated *NewNew Polar Bear* in October 2023. Two further cables, between Sweden and Lithuania and between Finland and Germany, were damaged by the Chinese bulk carrier *Yi Peng 3* in November 2024. Both vessels had

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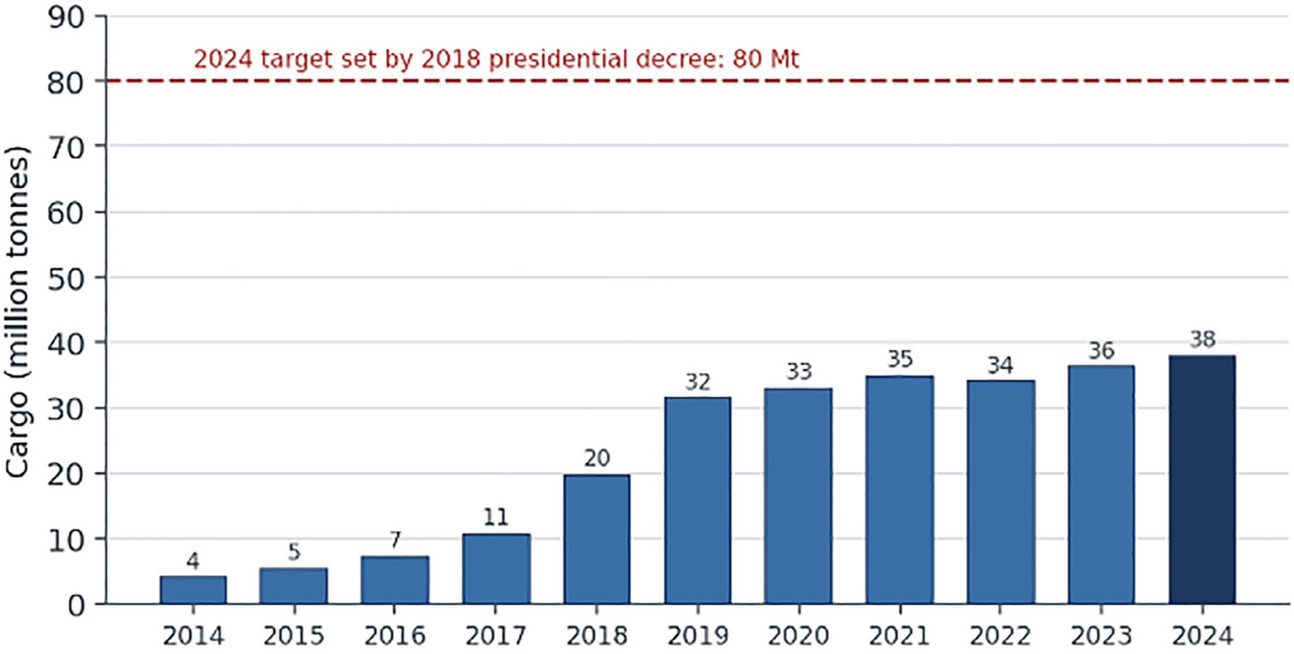
Figure 6. Northern Sea Route cargo volume, 2014-2024



Volume reached a record 37.9 Mt in 2024 — less than half the 80 Mt target — with traffic now almost exclusively Russia-China. Sources: Rosatom / NSR Administration via Centre for High North Logistics.

sailed from Russian ports.[46] Attribution remains contested, but several European investigators judge Russia's shadow fleet the likelier prime mover, and a Finnish court dismissed a related case involving a Russian-linked tanker in 2025 for lack of evidence of intent.[47] But the governance lesson holds: whoever the culprit is, the Convention gives coastal states only limited authority to stop and board foreign-flagged vessels in international waters. It took a NATO mission, Baltic Sentry, launched in January 2025, to put surveillance and deterrence for critical infrastructure—something that the law of the sea leaves substantially unprotected.[48] It is not a surprise that dual-use infrastructure is precisely where the gaps in ocean governance create a security deficit.

Europe's own institutions have begun, belatedly, to see it. In November 2025, the European Parliament adopted a recommendation on Arctic strategy by 510 votes to 75, calling on the Union to monitor China's activities under the Polar Silk Road. It also acknowledged that Beijing's ambition to become a polar great power by 2030—pursued through research missions, strategic infrastructure, and dual-use partnerships—may challenge established governance principles.[49] The Commission opened a review of EU Arctic policy the following month.[50] These are the first signs of an integrated reading, but they remain, for now, a parliamentary recommendation and a consultation rather than an executive strategy.

The Economic Backdrop: rivalry that securitizes everything

None of these maritime files can be insulated from the state of the wider relationship, and that relationship has hardened. The Union has defined China since 2019 as simultaneously a partner, an economic competitor and a systemic rival, and the balance has tilted steadily toward rivalry. This shift has been reinforced by China's *de facto* support for Russia's ability to continue its illegal war against Ukraine. The complicating factor is that the U.S. actions have more recently forced Europe to balance against an increasingly unpredictable partner, particularly as threats against Denmark and Greenland have been voiced.[51] The EU's operating doctrine is to de-risk without decoupling: to reduce critical dependencies while keeping channels open. But derisking has been slow by necessity.[52] The summit of July 2025, convened to mark 50 years of diplomatic relations between the EU and China, was compressed to a single day and produced no breakthrough. The Commission president called it an inflection point and warned that, without movement on Chinese overcapacity, the EU could not sustain its current openness. Beijing, meanwhile, retorted that decoupling would lead only to self-isolation. The two sides remained at odds over China's support for Russia's full-scale war against Ukraine and its implications for Europe.[53]

> ***"If you set the arenas side by side, the common mechanism becomes unmistakable. On the high seas, China ratifies late but in time to secure a seat at the table, then bids for the secretariat that will control the operational definitions. In the Arctic, it converts observer status into indispensability as the consensus forum fractures and a sanctioned Russia turns toward it. At the chokepoints, it develops parallel naval capacity and bilateral arrangements rather than joining collective defense. In the South China Sea, it rejects outright the one binding adjudication that would make it a rule-taker.***

The frictions have since sharpened around exactly the dependencies that matter most. China's imposition of export licensing on critical minerals and permanent magnets in April 2025 exposed Europe's near-total reliance on the magnets and critical minerals underpinning its digital and green transitions. China controls roughly 60 percent of supply and 90 percent of processing.[54] The Union's countervailing duties on Chinese electric vehicles remain in force,[55] and through the spring of 2026 Beijing threatened countermeasures over the EU's "Made in Europe" procurement preferences and its Cybersecurity Act. The trade commissioner promised to defend European industry while denying that a trade war loomed.[56] The irony is difficult to miss: China has its own policy of "Made in China", and a much stronger and more invasive cybersecurity regime. This is the environment in which the maritime files now sit. Systemic rivalry has securitized the relationship as a whole. That is precisely why issues that ought to remain technical—a research station, a cable, a fishing license, a secretariat—keep being pulled into the security frame.

One Campaign and Four Files

If you set the arenas side by side, the common mechanism becomes unmistakable. On the high seas, China ratifies late but in time to secure a seat at the table, then bids for the secretariat that will control the operational definitions. In the Arctic, it accumulates a treaty foothold, scientific memberships, and a research presence, then converts observer status into indispensability as the consensus forum fractures and a sanctioned Russia turns toward it. At the chokepoints, it depends on the same waterways as Europe but develops parallel naval capacity and bilateral arrangements rather than joining collective defense. In the South China Sea, it rejects outright the one binding adjudication that would make it a rule-taker.

Four theaters, one logic: secure influence over the rules and avoid becoming bound by them.

Europe, by contrast, runs each arena as a separate file with a separate lead service even if the main policy responsibility for maritime affairs is with DG MARE. DG MARE leads on the high seas; the External Action Service and the Common Security and Defense Policy handle ASPIDES; trade and industry manage rare earths and electric vehicles; and the External Action Service and the European Parliament handle the Arctic and the South China Sea through different policy channels. The asymmetry is structural, not a matter of effort or competence, i.e., one actor runs a campaign, and the other maintains a registry of files. The November 2025 Arctic recommendation matters precisely because it is the first major European document to begin connecting the threads: subsea cables, shadow-fleet shipping, Chinese observer behavior, into something resembling a single picture. The task now is to generalize that instinct across the other files before the rules that will govern the ocean for a generation are settled without sufficient European weight behind them. The argument is not that the EU or China has the correct toolbox, but that they are inherently different as they approach the maritime order through fundamentally different logics.

"In June 2025, the European Ocean Pact was adopted, a single framework that, in the Commission's own admission, responds to the fact that the Union's ocean strategies had been developed in isolation. The Pact sets out to do precisely what this paper urges, namely to read maritime security, international ocean governance, the blue economy and ocean observation together rather than file by file. A binding Ocean Act will follow in 2027.

That integrating instinct, in fact, already has an institutional home, which both strengthens the argument and complicates it. Ocean policy in Brussels is run not by the security services but by DG MARE, the department that leads the EU's high-seas and international-ocean-governance agenda and is therefore the European counterpart whenever China advances inside the treaty bodies. In June 2025, that directorate adopted the European Ocean Pact, a single framework that, in the Commission's own admission, responds to the fact that the Union's ocean strategies had been developed in isolation. The Pact sets out to do precisely what this paper urges, namely to read maritime security, international ocean governance, the blue economy and ocean observation together rather than file by file. A binding Ocean Act to follow in 2027.[57] The Pact is genuine evidence that Europe has begun to see one ocean where it once saw four currents, and it is the obvious vehicle for the coordination urged below. Its limits, however, are equally telling. It is a non-legislative framework coordinated by a directorate with no security mandate. Its writ therefore runs through science, fisheries, and environmental governance but stops where China's maritime conduct turns into a hard-security problem. The Pact's reach, for now, is well ahead of its grip.[58] The security aspect remains a critical gap. Without a mechanism to connect the Pact to Europe's security instruments, it risks becoming toothless precisely where the maritime challenge becomes most acute. An extended ASPIDES mandate, or a comparable security instrument, would therefore need to complement any future Ocean Act.

What Follows for Europe

Three implications follow, and they are matters of posture before they are matters of policy. The first is to treat the contest over the High Seas Treaty as a question of strategic autonomy rather than as an environmental footnote. With the first Conference of the Parties expected in January 2027, the Union should consolidate its member-state ratifications and its leadership of the High Ambition Coalition behind both a credible secretariat bid and, more importantly, a set of rules of procedure that constrain discretionary drift in the designation of protected areas and the sharing of genetic-resource benefits. If, nonetheless, the host and those rules are settled on terms that favor Beijing, which is possible given European divisions, the European response ought to pivot from contesting the venue to embedding independent scientific review and transparency into the treaty's decisions.

> ***Rather than creating an entirely new body, the Union should give the Pact's governance structure an explicit mandate to track Chinese conduct across the high-seas, Arctic, and chokepoint files together. The 2027 Ocean Act should then place that coordination, hard security included, on a firmer legal footing than a voluntary framework can provide.***

The second is institutional. The Commission's Arctic-policy review is the natural vehicle to merge the files, creating a doctrine in which subsea-cable protection, the Red Sea mission and maritime security, Northern Sea Route monitoring, and the high-seas regime are read together rather than in separate dossiers. It should also create a standing mechanism that reports on Chinese conduct across all four arenas simultaneously. The European Ocean Pact is an even more ready vehicle. Rather than creating an entirely new body, the Union should give the Pact's governance structure an explicit mandate to track Chinese conduct across the high-seas, Arctic, and chokepoint files together. The 2027 Ocean Act should then place that coordination, hard security included, on a firmer legal footing than a voluntary framework can provide. Europe will not match a campaign with a registry; on the contrary, it needs an integrating lens, and ideally a single coordinator with military backup to hold it all together.

The third is to keep economic de-risking and maritime governance in the same field of view while staying clear of a self-defeating trade war. Holding the line on electric-vehicle duties, procurement preferences, and cybersecurity rules is defensible. Escalation, however, should be sequenced and tied to thresholds. A renewed weaponization of rare-earth licensing, or concrete retaliation against European legislation, should trigger accelerated diversification rather than symbolic tariffs. The objective throughout is not to manufacture confrontation in arenas where genuine functional cooperation is possible, such as search and rescue, scientific exchange, and fisheries enforcement, but to pursue that cooperation with open eyes, without mistaking a shared lifeboat for a shared destination.

A final caveat is owed to the argument itself. The claim that these four files are one campaign is an analytical reading, not an assertion that a single written master plan exists in Beijing. Assessments often describe the Polar Silk Road as stalled, even "at an impasse", and the "tactical retreat" interpretation—in which China redirects effort toward its most permissive partners and most accessible institutions rather than advancing on every front—fits the evidence at least as well as any narrative of persistent advances. The thesis is strongest where it is most testable: in the secretariat contest now underway over the High Seas Treaty. It should be argued there on the merits, not assumed. The broader burden of this analysis, however, is straightforward: Europe will understand China at sea far better by asking what Beijing wants from the governance of the ocean as a whole than by continuing to ask, file by file, what it wants in each separate sea.

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